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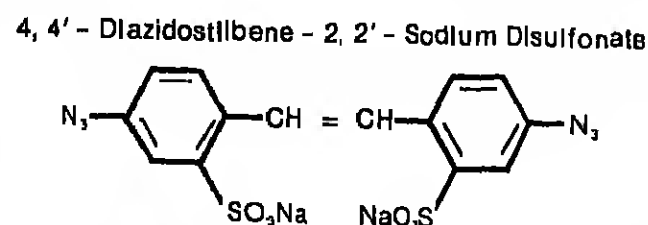
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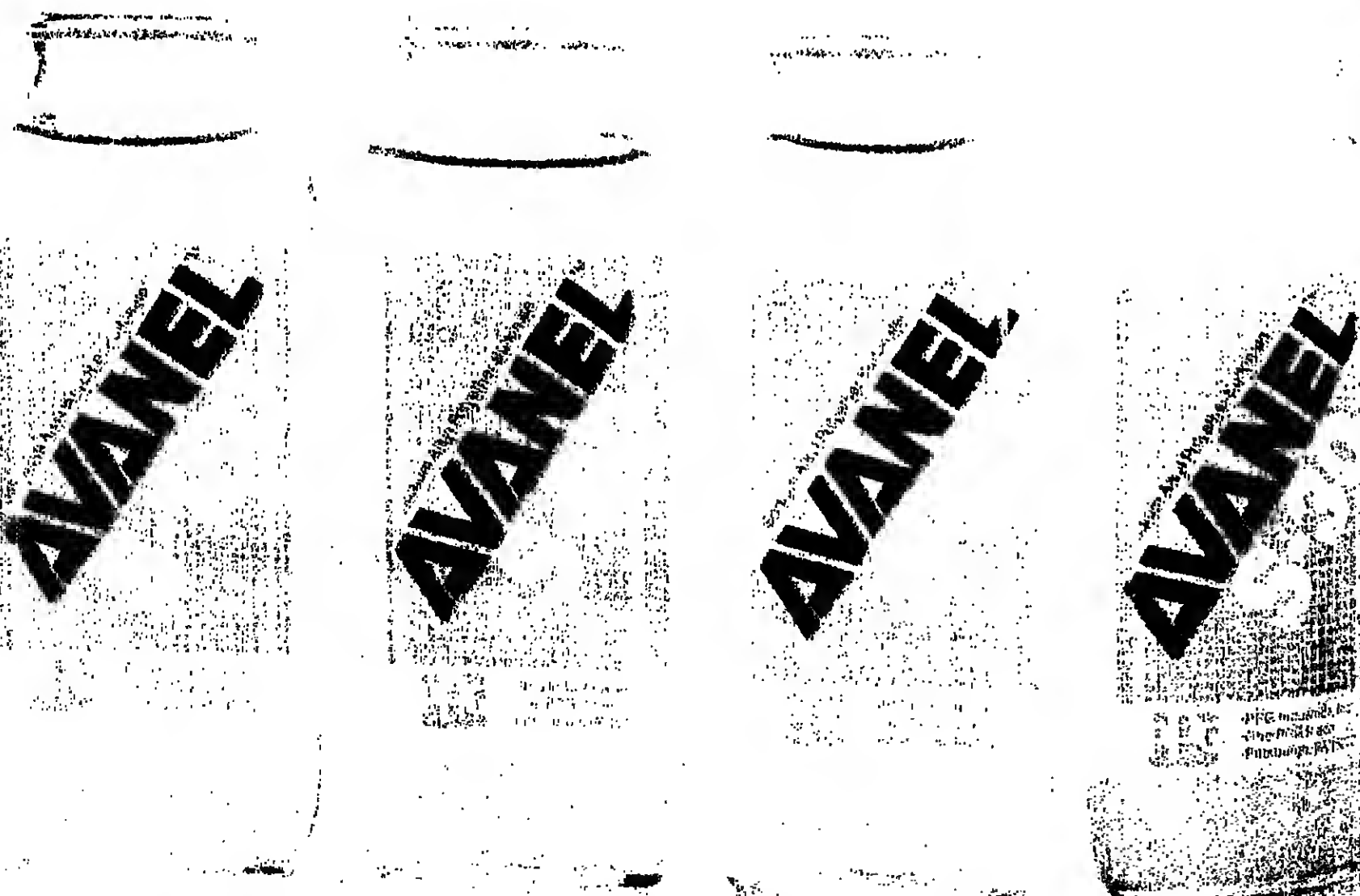
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Gas-Methanol Gets Boost From EPA

Environmental Protection Agency says it has decided to remove certain restrictions from an unleaded gasoline and methanol blend originally developed by E.I. du Pont de Nemours & Co.

In January 1985, EPA granted Du Pont a waiver for its gasoline-alcohol fuel blend, which contains five percent methanol and 2.5 percent co-solvent alcohols, on the condition that the producers adhere to an evaporative index to limit any possible increases in fuel volatility.

EPA said it was not convinced from information then available that using the American Society for Testing and Materials (ASTM) standards as Du Pont proposed would provide sufficient control of fuel volatility and thus the evaporative hydrocarbons from vehicles using the blend.

Hydrocarbon emissions contribute to the formation

of ozone, an EPA-regulated pollutant, which causes respiratory problems.

In the decision signed October 22 by EPA Administrator Lee M. Thomas, the agency noted that information obtained since the original decision shows that volatility levels of commercial gasoline on the market today have been rising and are close to the ASTM maximum limits.

The agency said it now believes application of the ASTM standards is sufficient to ensure that evaporative emissions of vehicles using the Du Pont blend will

Continued on Page 43

CARS OF THE FUTURE: US agency now believes that use of ASTM Standard will allow methanol-gas automobile engines to attain acceptable emissions levels.



Trade Secret Safety Enhanced by New Law

President Reagan has signed into law legislation amending the Freedom of Information Act (FOIA) to give businesses a greater opportunity to protect trade secrets and other confidential information from disclosure by Federal regulatory agencies.

The measure, which establishes new procedures for determining whether to release business information that has been designated as confidential, is supported by drug and chemical companies.

It requires that companies be notified when an organization or individual files an FOIA request for their business records, some of which may reveal trade secrets exempt from disclosure. The notification period could delay release at least six weeks if the information was found to be public.

Consequently, the legislation was opposed by public interest groups that often file FOIA requests on grounds it would delay release of much information that should be public.

But Rep. Glen English (D-Okla.), the bill's chief sponsor in the House, says it will not permit agencies to withhold any information currently made public.

"This legislation is strictly a procedures bill," he remarked during House floor consideration on September 22. "It only modifies the procedures used by agencies in making disclosure decisions."

The bill was strongly supported by Chemical Specialties Manufacturers Association, which says the revised measure provides

companies with "fair and certain" protection and corrects "serious procedural ambiguities" in the original statute.

Under these new procedures, when an outside interest makes an FOIA request for information which has been designated as confidential by the business which submitted the information, the agency must notify the submitter to allow the business to object to disclosure.

An agency would be given five days to notify the submitter that an FOIA request has been made, and the submitter would be allowed up to 10 days to file objections. The agency then has 10 days to determine whether to comply with the request.

If an objection to disclosure has been made, the agency must wait 10 additional days before releasing the information. Under specified circumstances, these time limits would be shortened if a requester asks for expedited consideration.

The agency would not have to notify the submitter regarding a FOIA request if the information was not designated as confidential. If the agency first determines that the request should be denied, if disclosure is required by law or regulation, if the information is already public, or if the agency determines that the information is not confidential, despite its designation.

The measure permits submitters to file so-called "reverse" lawsuits under the FOIA which seek to prevent an agency from releasing submitted information (previously such

Continued on Page 15

Toxic Waste Reduction Posited by US Agency

The amount of toxic waste generated by US industry could be reduced by one-third or more through the use of special processing techniques, according to Environmental Protection Agency.

In a report to Congress on the minimization of hazardous waste, EPA also said it would develop the first national data base on hazardous waste reduction techniques and that it would also provide technical assistance to help companies achieve waste reductions.

"Industry has significant potential to reduce public health and environmental risks by minimizing its hazardous waste production," said J. Winston Porter, EPA assistant administrator for solid waste and emergency response.

"Such reductions also could reduce disposal costs and the nation's need for treatment and disposal facilities. As a result, EPA does encourage industry to find ways to reduce both the volume and the toxicity of its waste, and we will work closely with the states to help foster waste reduction technologies," he said.

EPA said a survey of 22 industrial processes concluded that if existing techniques and new waste-reduction technologies are

fully implemented, hazardous waste could be reduced by at least one-third.

Modifying production processes and improving internal management practices account for most of the hazardous waste reduction occurring today, said EPA. Only four percent of the total hazardous waste generated in 1981 was recycled, the agency found, leaving a significant recycling potential untapped.

EPA also found that, up to now, hazardous waste reduction has generally been the result of industry's efforts to decrease manufacturing costs, improve product yields, and comply with existing environmental regulations, rather than overall attempts to reduce waste production.

However, new incentives now exist for industry to reduce hazardous waste. Among them, Federal and state hazardous waste regulations, which have significantly increased the cost of disposal.

For example, land disposal of a ton of hazardous waste today averages around \$250, whereas disposal of that waste before the regulations were implemented averaged around \$15. Incineration today costs even more, from \$500 to \$1500 a ton.

The more costly treatment technologies,

Continued on Page 24

Chemical Marketing Reporter

VOLUME 230
Number 18

NOVEMBER 3, 1986

NPK Consumption Hurt by Farm Program

US Department of Agriculture's October 24 announcement of a paid land diversion (PLD) program for feed grains has reconfirmed analyst forecasts for 1986-1987 fertilizer year NPK consumption.

USDA announced in late September that the 20 percent acreage reduction program (ARP) in effect last year would be continued. In this program farmers who idle 20 percent of their available land are entitled to participate in government price programs.

The PLD comes on top of the ARP and gives participating farmers the option to idle up to 15 percent more of their crop acreage next Spring in return for \$2 per bushel on grain that normally would have been grown on that acreage.

The Fertilizer Institute, while disagreeing with government farm policy in general, feels that the plan is not as bad as it could have been, given prevailing sentiments. TFI says that talk had circulated at USDA of a PLD as high as 30 percent, owing to enormous political pressure and record grain stocks. Also, TFI notes that the announcement is being made early enough in the year to allow the fertilizer industry time to plan accordingly.

Analysis, though, were generally not surprised by the announcement, having anticipated a PLD between 10 and 20 percent. Harry Baumes, at Chas Econometrics, Bala Cynwyd, Pa., points out, however, that the \$2 per bushel payment is fairly high and is likely to encourage farmer participation above the historical 85 percent level.

This year's planted acreage for corn, the most fertilized grain, is pegged at 78.8 million acres by USDA. Mr. Baumes expects planted corn acreage next year to drop to between 87 and 70 million acres, depending on actual participation levels. During the last significant acreage reduction plan, 1983's payment-in-kind (PIK) program, about 80 million acres of corn were planted.

Mr. Baumes feels that corn stocks at the end of the 1986 marketing year (next August) will be an all time high, between 5.2 and 5.5 billion bushels. He says that the PLD program will bring this down by August 1988, but not below 4 million bushels.

The devastating PIK program was precipi-

lated by then-record corn inventories of 3.5 billion bushels. The feeling among analysts is that some kind of PLD program will continue for at least another year beyond this one.

Taking the PLD into account, Ken Nyiri, an analyst with Texasgulf, expects total NPK consumption to decline between 5 and 6 percent in the 1986-1987 fertilizer year. Specifically, he sees a nutrient tonnage consumption drop from 4.4 to 4.1 million tons for P₂O₅, from 5.3 to 5.0 million tons for K₂O, and from 11.0 to 10.4 for N. Mr. Baumes is somewhat less optimistic, and sees an average NPK consumption decline closer to 7 or 8 percent as compared to the previous fertilizer year.

Either way, the NPK consumption drop is not expected to be as severe as the PLD might imply. This is partly because farmers are expected to idle less productive, and consequently less fertilized, land, and partly be-

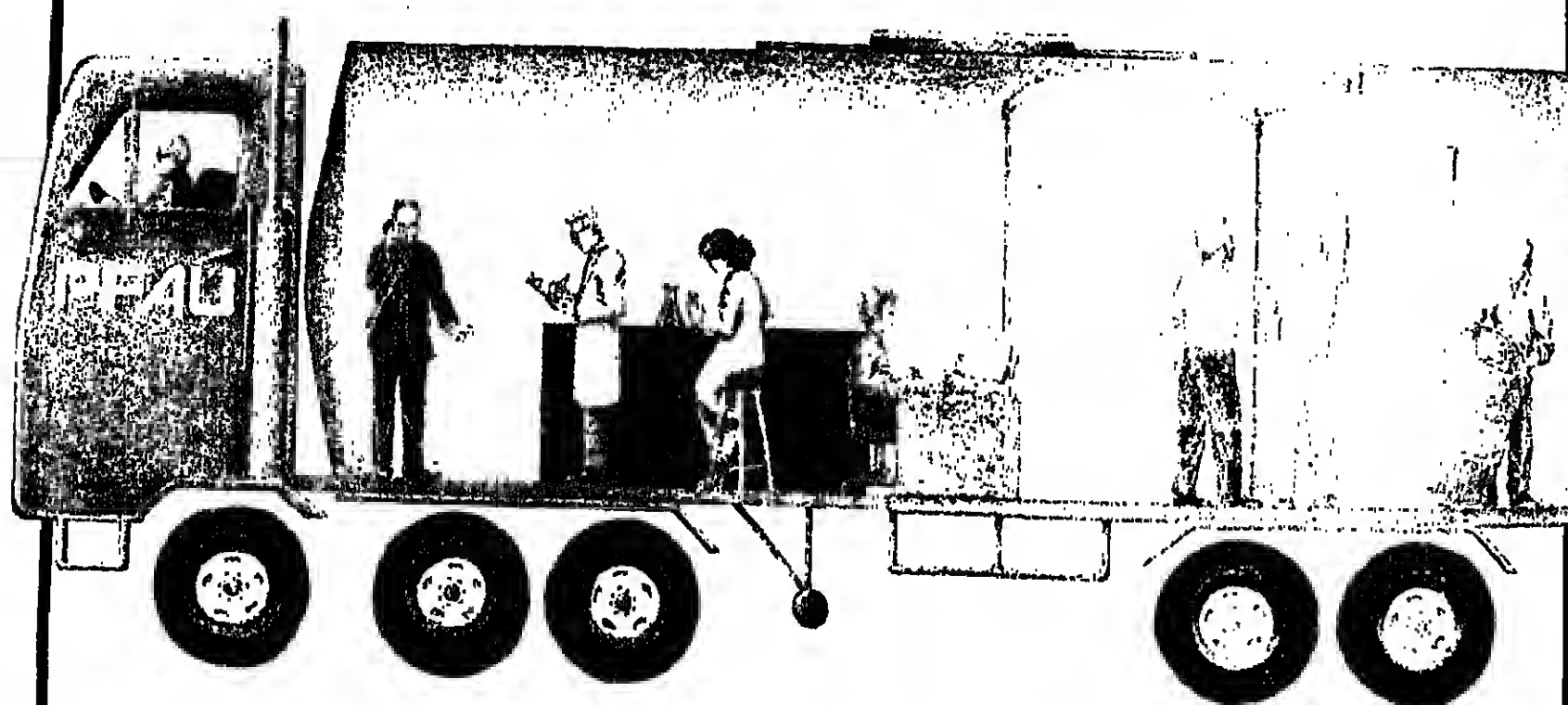
Continued on Page 42



FERTILIZER CONSUMPTION: Federal farm programs are cutting into demand for fertilizers.

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Detergents in Europe

Consumption growth rates of 10 to 15 percent annually for some specialty surfactants and non-phosphate detergent builders can be expected as consumer product formulations change in many Western European countries.

This rapid growth in consumption of raw materials for detergents, fabric softeners and personal care products is forecast in a study just completed by Colin A. Houston & Associates, Mamaroneck, N.Y.

Overall consumption of surfactants will continue to grow to 1995 from its present level of 1.4 million metric tons worth \$1.7 billion.

According to the Houston study, a complex set of economic, political and competitive pressures are resulting from environmental concerns.

Consumer product companies are completely revamping the image of their products as well as introducing major reformulations.

Concern over phosphate's role in eutrophication has led to voluntary and legislated reductions in STPP consumption and rapid growth in the use of non-phosphate builder systems in detergents.

Concern over biodegradation has led to voluntary and legislated reductions in alkylphenol ethoxylate consumption in household products and growth in alcohol ethoxylate consumption.

In personal care products, substantial increases in use frequency of shampoos and shower products is causing very strong demand for mild surfactants.

Product trends and growth rates vary widely among the 13 countries and 16 end uses studied.

Superfund Suit Alleges Rules Are Too Generous

The National Wildlife Federation has filed suit against the Department of the Interior, alleging that regulations written for the superfund hazardous waste law will allow polluters to escape paying appropriate damages when they injure fish, wildlife, and other natural resources.

Interior's regulations, released in August, determine how much money state and federal agencies can collect from either polluters or the Superfund for injuries to fish, wildlife, and other natural resources caused by toxic leaks and spills. Every year, according to government data, there are about 10,000 reported leaks of toxic substances into the nation's environment.

Calling Interior's regulations "the stepchild of the superfund program," NWF executive vice-president Jay D. Hair said, "Interior has failed in its duty to protect and restore our nation's natural resources. Conservationists had to sue the department to issue the long-overdue rules. Now it's clear that Interior hopes to minimize the amount of money available to restore damaged resources, from national parks to endangered wildlife."

Both the Environmental Defense Fund and the Public Citizen Litigation Group joined NWF in the suit, which takes the form of a petition for review in the US Court of Appeals in Washington, D.C. The suit will challenge

the rules in several areas, alleging that they:

- Fail to require that sufficient funds will be available to restore or replace natural resources damaged by toxic leaks or spills, or to acquire equivalent resources where restoration or replacement is impossible.

- Illegally bar state officials from obtaining a "rebuttal presumption" of the correctness of their damage assessments when a polluter challenges the state's conclusions.

- Unlawfully allow the polluters to perform the entire assessment of the money they owe for damage to natural resources than they themselves cause.

- Unlawfully require that the "market value" of resources, including national parks, wilderness areas, and endangered species, will measure damages, rather than the actual value of the resources to the public.

- Arbitrarily deny environmentalists and citizens the same rights to participate in decision making that are given polluters.

- Unlawfully suggest that damage to natural resources suffered by individual members of the public is not compensable under the rules.

The Federation noted that the suit was significantly strengthened by the 1986 superfund amendments signed into law on October 17. Congress severely criticized the natural resource damage rules in enacting the new amendments, and Congress specifically reversed some provisions of the rules.

Grace Retail Outlets Sold To Management Investors

W.R. Grace & Co. has completed the sale of its Home Quarters Warehouse business for more than \$10 million to a management investor group led by Bernard R. Kosar, senior vice-president of Grace's retail group.

Grace will retain a 25 percent interest in the retail business, which serves the do-it-yourself and professional markets, with outlets in Virginia Beach and Hampton Bays, Va., Columbia, S.C. and Tallahassee, Fla.

Financing for the sale was provided by Citicorp Industrial Credit Inc.

The transaction is part of a corporate restructuring program initiated by Grace last December which includes the company's departure from retailing.

Grace sold its interest in Herman's World of Sporting Goods in April for \$227 million and its Home Centers West unit in June for approximately \$185 million. Last month, the company reached an agreement to sell its J.R. Robinson Jewelers business for approximately \$55 million.

Also in October, the company reduced its corporate staff in New York City and sold its Bearborn Engineering Group. Grace plans to sell the rest of its retail group, as well as its interest in Taco Villa, its fast food operation,

and complete a leveraged buyout of its restaurant group.

The restructuring and cost-cutting moves were prompted by the repurchase by Grace of 20 percent of the company's stock from the Flick Group of West Germany.

Grace has been considered vulnerable to a takeover attempt ever since Flick sold its 26 percent holding. Speculation about a possible takeover attempt has focused largely on Samuel Heyman, chairman of GAF Corporation, who launched an unsuccessful, but profitable, bid for Union Carbide Corporation after his winning proxy fight to gain control of GAF.

Fiat Affiliate Buys Into Clinical Sciences

Bioengineering International BV, an affiliate of Italy's worldwide Fiat automotive group, has purchased 4 million shares of Clinical Sciences, Inc., a manufacturer of medical diagnostics and serological reagents, based in Whippany, N.J., for \$2 million. This represents 52.8 percent of the American company's stock.

Ozone Depletion Now Blamed on Sun

New satellite data suggests that the sun, not chlorofluorocarbons, may be responsible for the potentially dangerous depletion of the atmospheric ozone layer above the South Pole, says a study published Thursday.

According to the analysis by the National Aeronautics and Space Administration, an intense peak of solar activity that ended in late 1979 and early 1980 produced a number of complex chemical reactions that led to a global decline in atmospheric ozone levels and a major depletion over Antarctica.

Because the sun's activity has now subsided, the ozone may be returning to its normal state, says Linwood B. Callis, an author of the NASA study.

Mr. Callis says he has found satellite data suggesting a climb in ozone levels this year, lagging by several years behind the decline in the intense solar activity.

If the solar theory of ozone destruction proves to be correct he says, "This will be the first indication that a solar cycle can have such a major effect on the atmosphere."

Just one week earlier, a US research team in Antarctica said they had found strong evidence against theories that high solar activity or wind currents were the cause of the phenomenon.

But other US scientists questioned whether those hypotheses could be ruled out on the basis of the preliminary data collected by the

National Oceanic & Atmospheric Administration expedition.

Ozone, an ionized form of oxygen found in the upper atmosphere, shields the earth from some of the sun's harmful ultraviolet radiation.
Continued on Page 64



Sam F. Segner, formerly chairman and chief executive of HNG/Internorth Inc. (now Enron) who has been named chairman of Vista, replacing Gordon A. Cain, of the Sterling Group.

Fertilizer Retailer Study Finds Dry Operations Cheaper

Results of a major new study on the costs of operating a retail fertilizer business reveal that dry-only operations incur \$48.66 per ton, fluid-only plants experience costs of \$65.57 per ton and operations dealing in both liquid and dry products have costs of \$55.99 per ton, on average.

These findings were part of a first-ever analysis of retail business costs, funded by the Fertilizer Institute and conducted by the Tennessee Valley Authority's National Fertilizer Development Center.

The just-released information reports costs per ton for various functions within the retail operation, but does not include the expenses incurred for raw material purchases or in-bound transportation freight. A summary of the report's findings will appear in an upcoming issue of "Fertilizer Progress," a bimonthly publication of the Institute.

Of the firms studied, liquid-only and com-

bined (liquid and dry) operations have a higher average investment requirement per ton of business, reflecting a broader range of services. Investment costs — the amount required for a new entrant to buy and operate a firm — are \$57.30 per ton for dry, \$73.25 for liquid and \$66.80 for combined operations.

In all firms, expenses for salaries and depreciation represent approximately half of all costs. On the basis of cost by function, expenses associated with fertilizer application services are dominant across all firm types, posting \$22.41 for dry-only, \$26.85 for liquid and \$27.57 for both.

These and other findings are the product of on-site interviews and analysis of confidential expense data from 48 retail fertilizer dealerships — 23 handling liquid, 12 handling dry and 11 handling both product types. In each case, firms had sales approaching or exceeding 10,000 tons of fertilizer annually. The Tennessee Valley Authority will publish a comprehensive analysis in early 1987.

Drug Bill Pressed by Coalition As Administration Voices Fear

A coalition of lawmakers, drug company executives and health-care professionals called on President Reagan last week to sign legislation designed to compensate children injured by vaccines and promote exports of prescription drugs.

The omnibus health package, a bill which addresses nine major US health issues, was passed shortly before Congress adjourned.

But despite unanimous congressional approval and full support of the health research and pharmaceutical communities, Reagan Administration officials are split over whether the package should be vetoed due to the section that creates a vaccine-injury compensation fund.

Commerce Secretary Malcolm Baldrige, US Trade Representative Clayton Yeutter and Health & Human Services Secretary Otis Bowen are urging President Reagan to sign the package because it would allow drug and biotechnology companies to export US-manufactured products not yet approved for use here to Japan and 20 European nations that

have licensed the drugs for sale within their borders.

Sen. Orrin Hatch (R-Utah), told a news conference that without this change in US export law, American firms will move plants overseas, costing the US "thousands of jobs and hundreds of millions of dollars in exports."

He also noted that the bill's drug export provisions "make it the only non-protectionist trade legislation passed during this session of Congress."

Richard D. Godown, president of the Industrial Biotechnology Association, said a presidential veto could cause the US to lose its world leadership in the field of biotechnology.

"This change in the law will do more to maintain US leadership in biotechnology than any other action I can think of, and it's not a trade restriction," Mr. Godown said.

"It will halt the loss of leading edge technology in this field and it will keep jobs and capital investment at home. At a time when Japan has made it a top priority to take over

Continued on Page 43

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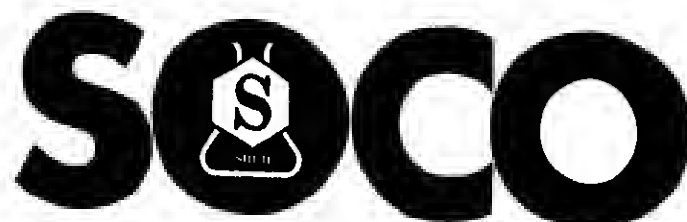
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News Capsule

Monsanto Signs Accord

Monsanto Enviro-Chem Systems Inc. has signed an agreement with Edmeston AB to use a new stainless steel in the acid systems of its sulfuric acid plants. The steel will replace cast iron pipe, heavy brick-lined steel vessels and other materials currently in place, Monsanto says.

Grace Unit Invests

Grace Ventures Corporation, the venture capital subsidiary of W.R. Grace & Co., has invested \$600,000 in Vitaprove Corporation, a San Carlos, Calif., developer, manufacturer and marketer of proprietary medical devices used to prevent, diagnose and treat infections associated with invasive and surgical procedures and wound management. The investment is part of a \$6.25 million venture capital financing.

Dow Unit In Shift

CD Medical Inc., a wholly-owned subsidiary of Merrell Dow, has become an operating unit of Dow Chemical Company. CD Medical, formerly Cordis Dow, manufactures membranes and artificial kidneys as well as medical equipment. CD Medical management now reports to Enrique J. Sosa, commercial vice-president for specialists, who is responsible for all of Dow's membrane-related businesses.

Alcan Contract Ratified

Members of Local 142 of the Aluminum, Brick & Glass Workers Union, which represents 450 employees at Alcan Ingot & Recycling's Sebree, Ky., smelter, have ratified a new three-year contract, ending a 143-day strike. Alcan did not disclose the terms of the contract but described it as "concessionary."

Rohm & Haas Service

Rohm and Haas Company has introduced a new water treatment program, which includes a group of managers who provide research, marketing and sales information to water treatment chemical formulators. The company says it can now respond more quickly to questions and problems concerning the use of polymers in boiler and cooling water treatment.

NL Industries Has Loss

NL Industries Inc., New York, had a third-quarter net loss of 27.9 million on sales of continuing and discontinued operations of \$308.2 million. In the third quarter a year ago, the company had net income of \$6 million on sales of \$360.4 million. Because of continued weakness in domestic drilling activity and associated pricing pressure, the company's petroleum service business recorded an operating loss of \$31.4 million.

Blair Recommends

William Blair & Co., of Chicago, is recommending the shares of National Sanitary Supply Company, distributor of a wide range of sanitary maintenance products to a broad customer base in the Southwestern US. Although a small company, it is among the largest in a big, growing but fragmented industry, commented Thomas S. Postek, industry analyst.

Amoco Declares Dividend

Amoco Corporation's directors have declared a regular quarterly cash dividend of 82.5 cents per share on the common stock, payable December 10 to holders on November 6. Amoco (formerly called Standard Oil Company of Indiana) has paid regular quarterly dividends for 78 years.

Reichhold Forms

The Chemical Coatings Division of Reichhold Chemicals, Inc. in Pensacola, Fla., has formed a new business unit — General Coatings Products, with Clifford Q. Schneider as vice-president and general manager. The unit will "further tap the potential within existing markets for our products lines," stated James J. Compass, president of Reichhold's Chemical Coatings Division.



Charles S. Locke

Morton Thiokol Sees Earnings Gain in 1987

Despite the reduction in aerospace earnings due to the Space Shuttle failure in February, Morton Thiokol, Inc., expects its earnings in fiscal 1987 to at least match the \$2.80 per share earned in fiscal 1986, ended June 30, and possibly reach \$3.00 per share, Charles S. Locke, chairman and chief executive officer, told a luncheon meeting of the New York Society of Security Analysts last week.

If \$2.80 is topped in 1987, it will mark the thirteenth consecutive year of earnings growth for the Chicago based producer of salt, specialty chemicals and aerospace products and services.

Mr. Locke told the analysts that Morton Thiokol's return on stockholders' equity is hovering just a shade below the company's high goal of a 20 percent return. The last recorded figure was 18.9 percent.

Long-term debt of Morton Thiokol has been gradually reduced from 35 percent in 1976, to only 4 percent now, about the lowest of any company in an industry in which the average has usually been in the 30-to-40-percent range.

This low debt represents a huge borrowing power which could be used for rapid expansion or a major acquisition.

When asked by an analyst about the possibility of "leveraging up," Mr. Locke indicated.

Continued on Page 45

Monsanto Eyes Sale of Assets To Indiana Firm

Monsanto Company is negotiating with Ball Corporation of Muncie, Ind., for the sale of its assets associated with Monsanto's plastic container business.

The container business, which makes and sells plastic bottles, has approximately 1,800 employees at nine locations in the US. If the negotiations result in the sale of the business, substantially all of the employees would be expected to be retained.

Earl N. Brasfield, group vice-president of Monsanto, says, "Our container business is profitable but no longer fits into our business strategy."

"The reason we have entered these negotiations is because our container business appears to be of greater value and strategic importance to Ball Corporation," Mr. Brasfield adds. "We hope these negotiations will result in a definitive agreement within the next month."

The container business has administrative and support personnel at Monsanto's headquarters in St. Louis plus a technical center in Bloomfield, Conn., and manufacturing plants in St. Louis, Ligonier, Ind., Sharonville, Ohio, Anaheim, Calif., Kentworth, N.J., and Deep River and Stonington, Conn.

Carbide's Income Up On Divestment Gains

Union Carbide Corporation had third-quarter net income of \$290 million, reflecting a gain of \$252 million from disposal of businesses, mostly the sale of the home and automotive products business.

This compares to a net loss in the comparable 1986 period of \$543 million, which included special charges of \$820 million from the corporation's restructuring program.

On a comparable operating business, income in the latest quarter amounted to \$38 million, as compared with \$58 million in the 1986 period. Operating profit from continuing operations in the recent quarter was \$188 million, a 57 percent increase from \$120 million a year ago.

Operating profit of Union Carbide's Chemicals & Plastics business in the third quarter rose to \$210 million from \$32 million a year, while profit in industrial gases edged up to \$70 million from \$65 million and carbon product earnings increased to \$9 million from \$4 million. Losses were recorded in specialties and services.

In other earnings reports, A. H. Robins Company, diversified health care concern based in Richmond, Va., reported that its operating earnings in the quarter rose 31

percent to \$50,529,000, while net earnings were down 8 percent to \$24,959,000. The net earnings comparison was distorted by an extraordinary gain in the 1986 quarter.

E. Claiborne Robins, Jr., president and chief executive officer, said the principal contributors to 1986 growth in sales and operating earnings were generic injectables produced by the company's Elkins-Sinn subsidiary; non-prescription formulas of "Dimetapp," a cold and allergy product; "Micro-Extencaps," a prescription potassium chloride supplement; and the "Robitussin" family of cough preparations.

In Princeton, N.J., Squibb Corporation said its net income per share increased 15 percent from a year ago to \$1.55 in the third quarter, despite a charge to earnings of 22 cents per share, reflecting inventory adjustments and a restructuring of the medical systems business.

In line with previously announced decisions, these businesses — Westmark International, Inc. and Charles of the Ritz Group, Ltd. — are being reported as "businesses to be disposed of."

Richard M. Furin, chairman and chief executive officer, said that plans to distribute Westmark as a tax-free dividend to shareholders and to sell Charles of the Ritz

Continued on Page 13

Borg-Warner To Sell Unit

Borg-Warner Corporation said last week that it plans to sell its Industrial Products subsidiary by the end of this year as part of a corporate-wide restructuring program.

"Industrial Products is a good business long-term and a very well-managed company, but it does not fit with our plan to become a more focused company," said Clarence E. Johnson, Borg-Warner's president and chief executive officer.

Borg-Warner obtained Industrial Products in 1955 as part of its acquisition of Byron Jackson Pump. Industrial Products produces mechanical seals, aerospace actuators and large centrifugal pumps.

Based in Long Beach, Calif., Industrial Products recorded an operating profit of \$12.9 million for the first six months of this year, representing about 7 percent of Borg-Warner's total operating profit for the period of \$182.9 million. Sales of \$138.2 million represented about 8 per-

cent of Borg-Warner's total sales of \$1.8 billion in the first half of the year.

In September, Borg-Warner's board authorized the repurchase of up to 15 million of the company's shares on the open market and through private purchases. At that time, the company said funds for the stock buyback program would come mainly from the restructuring program. Borg-Warner, along with many others, is rumored to be a possible takeover target of GAF Corporation.

"We are continuing to examine our businesses and have identified others. In addition to Industrial Products, which will be sold," Mr. Johnson said last week.

The company said its plans for the sale of Industrial Products envision a continuity of current management, strategies, programs and products to assure no disruption of service to the group's customers and minimal impact on Industrial Products' employees.

Vulcan's Chemical Business Hurt by Imports, Soft Prices

Of Vulcan Materials Company's three lines of business, construction materials, the biggest and the most profitable has set the pace through the first nine months, and will continue to do so through the current quarter and into 1987, officials told a luncheon meeting of the New York Society of Security Analysts last week.

Vulcan's chemical business, consisting of chlorine-caustic soda, chlorinated solvents, pentachlorophenol and various other commodities, is reaping the benefits of a new cogeneration facility at Gelamar, La., but this is still outweighed by negatives in the chemical marketing picture.

The main problem continues to be high levels of imports despite the vastly improved conversion rate on the dollar, although this is being partly offset by an increase in US exports of chlorinated solvents as the lower value of the dollar is reflected in reduced prices of US-produced solvents when converted into local currencies, officials said.

Herbert A. Sklenar, president and chief executive officer, said that chemical shipments and earnings in the 1987 quarter will exceed the deeply depressed results of

the same period a year ago, but that sales and earnings for the full year will fall below the 1985 totals.

Charles E. Sturgenn, president of the Chemical Division, reported that the company's conversion of its chlor-alkali plant at Fort Edward, Wisc., from production of caustic soda to caustic potash is moving along on schedule and should be completed later this month toward start-up at the first of the year.

Newly instituted price increases in caustic soda are partly holding, and a methylene chloride price increase has been fully accepted, with the possibility of another being posted early in 1987, Mr. Sturgenn said.

During the first even months, chlorinated solvent imports continued to rise at a 17 percent rate over 1985 volume, but exports increased by 70 percent, he noted.

Lee K. Bailey, executive vice-president of construction materials, noted that all six of the company's construction divisions operate autonomously with their own presidents. Sales and earnings will continue to grow rapidly despite the failure to pass a highway construction funding bill and estimates that US housing construction in 1987 will fall to about 1.4 million to 1.5 million starts from

Continued on Page 66

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OILS, FATS & WAXES

Peanut Oil Price Strengthens; Poor Availability Outlook Cited

Peanut oil producers are expecting for less oil to be available this year as compared to previous years, and current pricing is reflecting that expectation. The harvest is also very late at this point, further aggravating the short supply situation and helping to push prices up.

According to US Department of Agriculture estimates, this year's peanut crop will be reduced by more than 10 percent compared to the 1985 crop. The projected size of this year's crop is 1.66 million tons, compared to last year's figure of 2.06 million tons, according to USDA.

"There'll be much less oil available this year," says an industry source, who anticipates steeper market conditions because of it. At the moment, little crushing stock is available, sources say, as only a little more than half of the crop has been harvested.

Thus far only a small proportion of oil-grade segregation three peanuts has shown up in the harvest, meaning that the oil industry will have to compete in the market with food-grade peanut buyers. It is cautioned, however, that not until all of the harvest has been completed can accurate assessments be made regarding the quality and grade of the peanuts.

LATE HARVEST

Exacerbating the short supply of peanuts is the lateness of the harvest. "Normally we're finished at this time," says a source, "but as it is we only have a little more than half the crop in." Late planting, drought conditions during the summer, and a rainy harvest season are the primary causes of the delay.

In late September, oil consumers became confident that oil would be readily available when they wanted it. Their slack buying brought the price down to levels as low as 25¢ cents per pound. As the crop outlook worsened in recent weeks, the price has come up appreciably.

At this point buyers are not very active in the market, sources say. The trading that has been going on of late has been by consumers rather than dealers. "Dealers have not been major players," says an industry source, who notes that buying is average, for "just normal everyday use."

It is considered unlikely that prices will ease down any time this year. Some sources believe that some of the larger producers may try to ration their supply, releasing only a little at a time. "We won't see any big flood of oil at any one time," says a source, simply because of the short supplies.

In any case, dealers are expecting a steady

market this year than in previous years. "Chances of seeing the price come down this year are slim," says another industry source, who believes that the price may come up more in the next week or two before the harvest is finished.

VEGETABLE OILS

CORN OIL — Availability of this oil is currently very tight, as reflected in the high price levels in the market. The tightness of

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

Corn oil, Midwest, 1c. per lb.
Cottonseed, 41% bulk, Memphis, \$10 per ton
Cottonseed oil, Valley, 1c. per lb.
Grease, white, choice, tanks, divd., NY, 1/2c. per lb.
Palm oil, NY, 1/2c. per lb.
Peanut oil, Southeast (restricted), 1/2c. per lb.
Soybean, 44% bulk, Decatur, \$2 per ton
Soybean oil, Decatur, 1/2c. per lb.

CHANGES/DOWN

Coconut oil, NY, 1c. per lb.
Lard, loose, bulk tanks, Chicago divd., 2c. per lb.

OILS, FATS INDEX

The Oils, Fats & Waxes index reflects the prices of 11 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1986 81.94
Oct. 24, 1986 80.49
Oct. 3, 1986 79.85
Nov. 1, 1985 86.49

Chemical Prices Start on Page 48

FRIDAY SPOT PRICES

MARKET CLOSE OCT. 31, 1986

CRUDE VEGETABLE OILS

Coconut oil, NY lb. .20
Coconut oil, Pacific lb. .20 1/2
Corn oil, Midwest lb. .20 1/2
Cottonseed oil, Valley lb. .17
Lard, loose, bulk tanks, Chicago lb. .25
Palm oil, NY lb. .18 1/2
Peanut oil, Southeast (restricted) lb. .30 1/2
Soybean oil, Decatur lb. .15

REFD. VEGETABLE OILS

Coconut oil, NY lb. .24 1/2
Corn, jumbo tanks lb. .28 1/2
Cottonseed oil, jumbo tanks, NY lb. .28 1/2
Peanut oil, jumbo tanks, NY lb. .38 1/2
Soybean oil, NY lb. .18 1/2

OILMEALS

Cottonseed, 14% bulk, Memphis ton \$150
Lard, rendered, 34% bulk, Fargo ton \$105
Peanut, 10% bulk, 82, Alabama ton \$155
Soybean, unrefined, 44% bulk, Decatur ton \$153

FATS & GREASES

Grease, white, choice, tanks, divd., NY lb. .10 1/2
Grease, yellow maximum 10%, 10 tanks lb. .9
Lard, loose, bulk tanks, divd., Chicago lb. .15
Tallow, inedible, fancy, tanks, divd., NY lb. .12 1/2
Tallow, inedible, blot, tanks, divd., NY lb. .12

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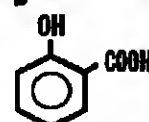
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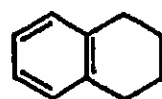
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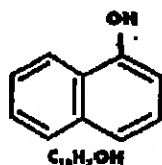
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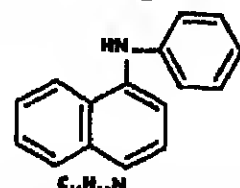
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AROMATIC ORGANICS Cyclohexane Price Hike Driven By Housing Mart

Cyclohexane producers say their contract price level for November 1 will at least reflect 2c. per gallon of the upward benzene contract adjustment. This raises the price for Phillips Chemical Company and others by 1.65c. per gallon, up to \$1.0090 per gallon. Some producers may be as much as 1c. per gallon lower than this level.

Phillips led an October 1 removal of 1c. per gallon off the industry's temporary voluntary allowance (TVA) that was first granted last year. Producers say this move has been successful, and, as a result, 3 cents have been eliminated this year from the 4 cents per gallon that constituted the TVA initially.

Producers attribute their ability to raise pricing to strong demand and plant closures that have pushed up operating rates in the industry.

Cul Canada shut its 30-million-gallon-per-year facility last December, and it has been said that 17 million gallons of US exports will end up having been created this year by that shutdown. There has been some talk in recent months that the plant might reopen under new management, but these rumors have quieted down recently, says a producer.

E.I. du Pont de Nemours & Co.'s 50-million-gallon-per-year Corpus Christi, Tex., plant has been shut since August, and is not expected to reopen until early next year. The company is working on routing hydrogen for the plant from a nearby facility in Victoria, Tex. Some producers remain skeptical about the feasibility of Du Pont's plans, and say the plant may not reopen at all.

SWING PLANT

Phillips idled its 90-million-gallon-per-year swing plant in Sweeney, Tex., this May, but says it will likely restart the facility in late November.

A producer says that, even though all the facilities that are in operation are running well, the market is fairly tight because of the plants that are down.

Cyclohexane production during the first half of the year was 1.112 million pounds, as compared with 688 million pounds during the first half of 1985. Producers attribute part of the pickup this year to a drawdown of inventory levels in 1985.

Demand has picked up this year in the major end market of carpeting as a result of strong housing start levels and also a high level of housing resales, producers note. Although housing starts get most of the attention, comments one producer, the replacement carpeting market has been more important this year.

"The replacement market was stagnant last year," notes a producer, who lays part of the reason for the pickup this year to a wearing out of the carpeting from the last housing boom in 1978-'79.

BTX — Benzene producers are raising contract price levels by 2c. to 5c. per gallon November 1 from the October level of 85c. per gallon.

According to an industry trader, Shell Chemical Company initially moved to 90c. per gallon, and was followed by Standard Oil

Company. However, Exxon Chemical Americas announced a price of 87c. per gallon, and Shell then reacted by moving to the same level. Standard Oil remained at 90c. per gallon.

Producers had been at the 65c. per gallon level for one-and-a-half to two months, one of the longest stable periods this year. Contract adjustments reflect strength in the benzene market.

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

None

CHANGES/DOWN

None

AROMATICS INDEX

The Aromatic Organics Index reflects the prices of 14 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1985	167.84
Oct. 24, 1985	167.84
Oct. 3, 1985	167.84
Nov. 1, 1985	167.84

Chemical Prices Start on Page 48

spot market, which was quoted last week between 85c. and 87c. per gallon, up from the previous week's 83c. to 84c. per gallon level. Industry players attribute much of benzene's firmness to strong derivatives demand, most notably styrene. "Derivatives are doing very well...and pulled benzene contracts up psychologically," says one source.

A trader observes that the upward trend has been running counter to crude oil pricing, which has been weak. "Oil looks a little shaky, on rumors that Saudi Arabia and Mexico have been discounting to pick up volumes," he comments. "Most product prices are off; aromatics are standing alone," observes another trader early last week.

However, later in the week, the removal of Sheikh Yamani from his position as Saudi Arabian oil minister was seen as providing some support for oil pricing.

The US futures market for hydrocarbons rose by the maximum permissible amount last Thursday following the Saudi announcement. Although it is too early to tell the long-term effects of Yamani's departure on oil values, and, hence, BTX pricing, a trader comments that "Yamani's policy had been to maintain market share by driving the price down."

The toluene market did not share benzene's strength last week. Spot pricing was quoted between 65c. and 87c. per gallon as compared with the previous week's price of 67c. per gallon.

"There is lackluster demand for toluene," observed one trader, and another attributes toluene's failure to follow benzene to soft gasoline pricing.

With the spread between benzene and toluene widening, Chevron Chemical Company said it was considering starting up its hydrodealkylation unit. However, a trader says that he does not believe Chevron "can see the sustained daylight" to justify a move.

The spot xylene market did firm up last week to between 78c. and 80c. per gallon from the 76c. to 77c. per gallon level of the previous week. "There are no barrels around," says an industry source.

AROMATIC SOLVENTS — Amoco Chemicals Company has announced prices for a line of "Panacol" solvents that are effective November 1.

The price for "Panacol AN-2L" is \$1.10 per gallon, the price for "Panacol AN-2K" is \$1.10 per gallon, and the price for "Panacol AN-3N" is \$1.05 per gallon. All prices

AROMATICS

Lab. Texas City, Tex., in tank cars and truck transport.

NAPHTHENIC ACID — Producers of refined naphthenic acid say they are encouraged by an evolving end use for the material in copper naphthenate as a fungicide in wood treatment.

Copper naphthenate's approval this year by a wood preservative association comes on the heels of government environmental action against pentachlorophenol, formerly the leader in this market, producers say.

Producers see strong growth in the wood treatment area compensating somewhat for weak demand this year from the oil field sector. With drilling down due to inexpensive oil imports, naphthenic acid's use as a corrosion inhibitor has been off significantly, says a producer.

There is some concern among producers over a potential decline in end market cobalt naphthenate's use in the radial tire industry. One producer says that, beginning next year, there are plans for some reformulation away from cobalt naphthenate by major tire companies.

Other applications for naphthenic acid are said to be more stable. These include paint and ink driers and lubricating oils. One producer points out that paint and ink drying applications are not interchangeable with other materials, but that uses in emulsifiers, lubricants and oil can be switched.

For crude naphthenic acid, pricing is quoted by one supplier in the mid-30-cent-per-pound range, and by another in a range of 35c. per pound for 150 acid grade to 43c. per pound for 410 acid grade.

One producer, Hewchem, says it is raising its crude pricing January 1 on 165 acid grade by 8c. per pound, to 34c. per pound from 31c. per pound. 180 acid grade will move up 6c. per pound, to 38c. per pound from 32c. per pound. At this date, no change is scheduled for 190 acid grade, which is posted at 30c. per pound. A rival producer says his current prices are very close to the level Hewchem is moving to January 1.

Refined naphthenic acid is quoted at 78c. per pound for 200 acid grade in bulk for the East Coast market. A West Coast producer quotes a price of 65c. per pound for 200 acid grade. It is said that this material is primarily

exported. Producers say that, in general, pricing has been fairly stable the past several months.

Producers of refined naphthenic acid say the market is tighter this year than last, and attribute much of this to Exxon's pulling out of the refined market in 1985 by shutting its South American facility.

One producer notes that "there was some jostling around and overbuying" when Exxon moved out of the refined business, and others say the market was "in a panic" briefly, but has been stable in recent months.

Crude suppliers say the market is rather tight on a worldwide basis, and one attributes this to a decline in the export activity of Romania. "There are some spot shortfalls and imbalances," he says.

Trade Secret Safety

Continued from Page 3

snits could only be brought under the Administrative Procedures Act).

In cases where a submitter has filed such a lawsuit, the bill gives preference to the requester in the choice of which district court the case will be argued. If the requester has a compelling commercial interest, however, the requester receives no special preference and the appropriate court is determined by standard legal procedures.

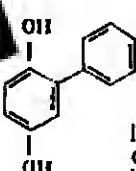
Finally, the new law requires that when courts review administrative decisions in cases brought by either requesters or submitters, the court will not be bound by the facts as found by the Federal agency involved (so-called "de novo" consideration), and provides that the submitter pay the legal costs of a requester if the court finds that the submitter's reasons for seeking to withhold the information were not justified.

Calcium Lactate OK'd

Effective Nov. 28, Department of Agriculture will allow calcium lactate to be used as a flavor enhancer in some sausages and meat sticks. Calcium lactate is generally recognized as safe as a food additive by Food and Drug Administration, and is already approved by USDA for use as a binder in some meat products, according to Donald L. Houston, administrator of USDA's Food Safety and Inspection Service.

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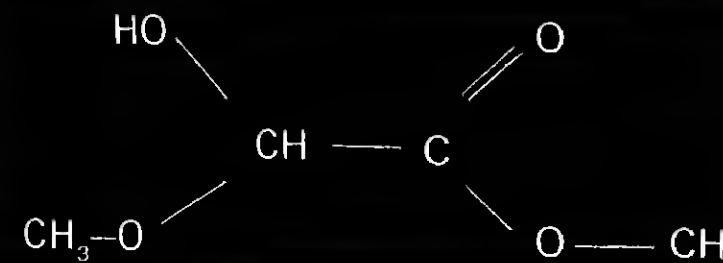
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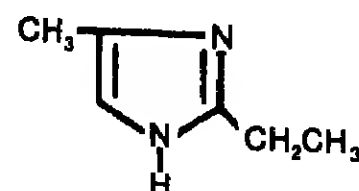
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Acid Rain Study Picked by DOE Meet Standards

Nine clean coal technology projects selected last Summer by the Department of Energy will accomplish many, if not all, of the objectives identified earlier this year by special US and Canadian envoys on acid rain.

That is the conclusion of an analysis sent to Congress by the Energy Department.

The analysis compares the environmental and economic benefits of the nine projects with the major recommendations for a clean coal demonstration program presented in January 1986 by Drew Lewis, special envoy to President Reagan, and William Davis, special envoy to Canadian Prime Minister Brian Mulroney.

The department selected the projects in accordance with a Congressional directive to fund a broad array of emerging coal technologies that would apply to a variety of commercial markets and use a wide cross-section of US coals.

By contrast, the Lewis-Davis report called for a program focusing on new technologies that could be added to existing utility power plants to economically control emissions from high-sulfur coal burning.

Nevertheless, the Energy Department concluded after a nine-month analysis that three of the nine selected demonstration projects conformed to all of the Lewis-Davis guidelines, while two more would meet the recommendations when deployed on a commercial scale. The remaining projects were found to meet at least half of the Lewis-Davis guidelines.

The department placed major emphasis on the following four distinct facets of the Lewis-Davis guidelines in reaching its conclusions:

- That the selected projects have the potential for the largest sulfur dioxide and nitrogen oxide emission reductions — both at the demonstration sites and in the future commercial applications.
- That funding be authorized for those

projects that reduce emissions at the lowest cost per ton.

• That more consideration be given to projects that demonstrate retrofit technologies designed to cut down on transmission air pollution.

• That special emphasis be given to technologies that apply to facilities currently dependent on the use of high-sulfur coal.

In comparing the nine selected projects with these recommendations, the department concluded that the pressurized fluidized bed combustion project proposed by American Electric Power Service Corp., the limestone injection multistage burner/sorbent injection concepts to be demonstrated by Babcock & Wilcox and the use of a natural gas "burning" and sorbent injection technology proposed by Energy & Environmental Research met all of the Lewis-Davis guidelines.

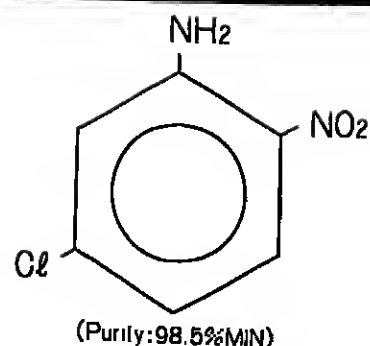
Two other projects — an advanced cycle combustor demonstration proposed by Tech Corp. and a coal gasification/combined cycle plant proposed by the Kellogg Company — met all the guidelines with the exception of reducing emissions during the demonstration phase. However, the department concluded that commercial use of these concepts would produce fewer emissions than the conventional technology they would replace.

In general, the report found, the demonstrated projects applicable to new, "grass root" facilities could reduce sulfur dioxide emissions by 15 to 96 percent and nitrogen oxide emissions from 19 to 87 percent over current federal New Source Performance Standards for utilities.

Those technologies which could be retrofitted to existing facilities could reduce sulfur dioxide emissions by 50 to more than 99 percent and nitrogen oxide emissions by 50 to 80 percent compared to an unretrofit high-sulfur coal-burning power plant.

In other comparisons, the Energy Department concluded that eight of the nine selected technologies could be applied to existing plants — the only one not applicable is advanced ironmaking demonstration proposed by Weirton Steel Corp. — and five could be used as retrofit technologies for existing plants. All nine showed the potential for economic improvements over comparable existing technologies, and all but one could use high sulfur coal.

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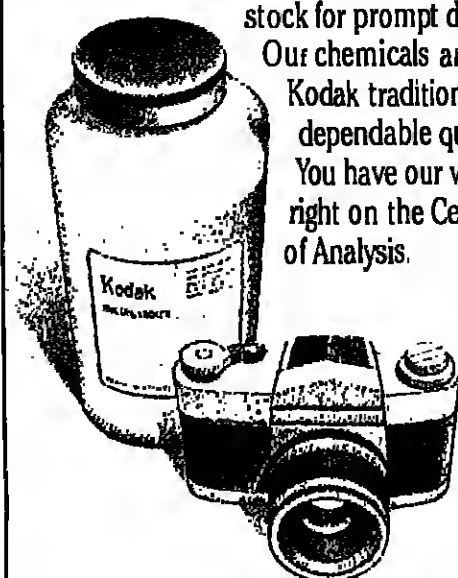
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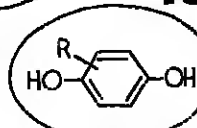
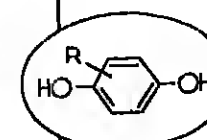
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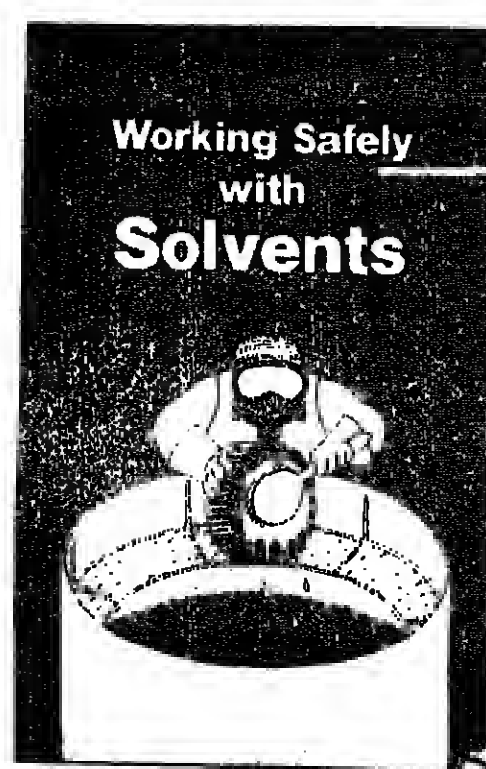
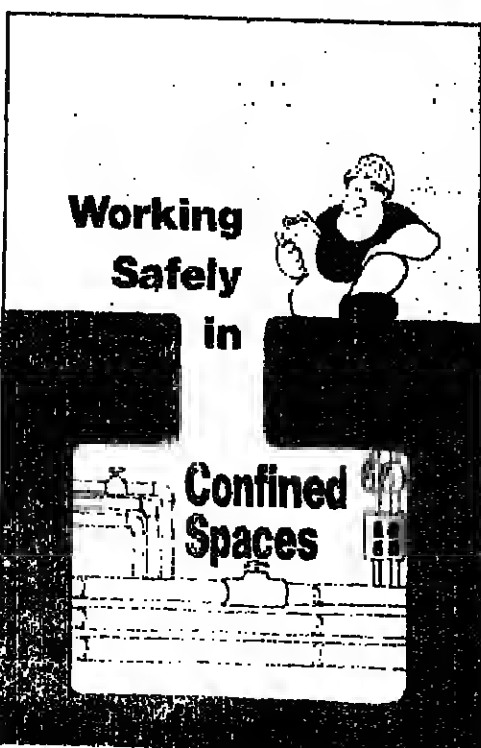
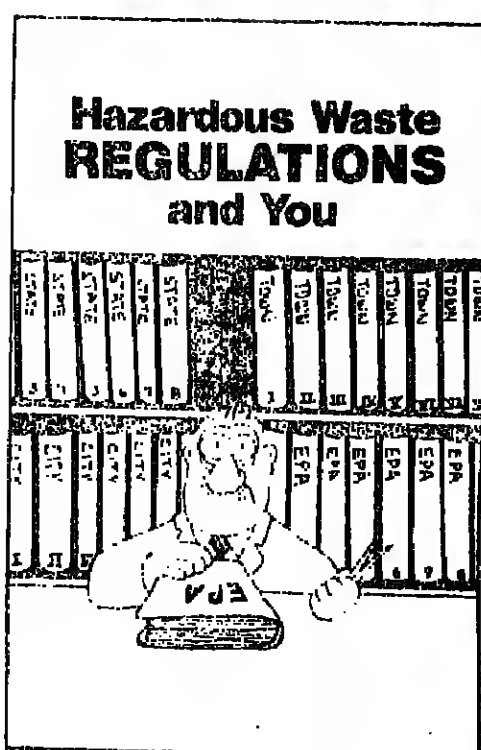
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ALIPHATIC ORGANICS

Propylene Price Hike Fails; Acrylonitrile Pressure Cited

Propylene prices failed to register real gains in October, cutting short a small September rally that producers hoped to sustain into the fourth quarter. Prices firmed a fraction in September, and producers tried to follow this with a 2 cent per pound increase last month. After a promising beginning, many sources now say that prices for the month showed little or no gain over September.

The hoped for October price increases were designed to reflect the firming price of crude oil and many petrochemicals. Since oil partly reversed its slide in August though, propylene prices had increased only one-half cent a pound or less. Producers hoped to recapture lost margins in October by posting 2 cent per pound price increases.

Early in the month, the price initiative appeared promising. One producer says some early contracts were settled at 10 cents per pound for chemical grade, up one-half cent from September's contract price. However, toward the latter part of the month, the firming trend lost its momentum and contracts slipped back to 9 1/2 cents by month's end. Spot prices, though, were able to firm a fraction in October, moving from 9 cents to 9 1/2 cents per pound in the month for chemical grade material.

OVERSUPPLY CITED

Sources attribute the failed price initiative to several factors. One is simple oversupply. Even though demand for propylene has increased in nearly every major end use this year, supply has been ample all year. Falling crude values made it very attractive to crack heavy feedstocks at ethylene plants and so propylene production from steam crackers has been high in 1986.

Also, the push to improve octane ratings has pushed oil refiners to run their catalytic crackers at high severity, thus increasing the supply of refinery grade propylene. Consequently, while demand is up considerably in 1986, there has been a supply overhang for the C3 material nearly all year.

Another major reason cited for low prices has been tremendous downward price pressure exerted by acrylonitrile producers. Faced with extreme competition in the export market, US acrylonitrile producers have watched their export prices fall from over \$700 to \$600 per metric ton in the past ten months. Given this long, sharp slide in prices, acrylonitrile makers have resisted higher raw material propylene costs. Since, no one observer notes, over 100 million pounds of propylene per month is consumed in making acrylonitrile for the export market, the acrylonitrile producers have been able to exert strong pressure to keep chemical grade propylene prices down.

Aside from acrylonitrile though, this has been something of a banner year for propylene consumption. Producers point out that demand for polypropylene has been outstanding, and that consumption of propylene oxide, cumene, isopropanol, and oxo-alcohols have all exceeded expectations.

The growing market for exports has also given a big boost to propylene makers, both by sopping up extra domestic supplies, and adding a little firmness to the pricing structure.

Along with a growing structural tightening in propylene supplies, European supplies grew very tight beginning in late August due to maintenance turnarounds at several European ethylene crackers. As a result US export demand has soared. Several sources estimate that orders for over 60 million pounds of US propylene were placed by European consumers in the past two months. A fire in the Houston Ship Channel in mid-October has held up over 20 million pounds of

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

None

CHANGES/DOWN

None

ALIPHATICS INDEX

The Aliphatic Organics Index reflects the prices of 20 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1986	222.80
Oct. 24, 1986	222.80
Oct. 3, 1986	222.80
Nov. 1, 1985	222.80

Chemical Prices Start on Page 48

exports until early November, but the size of this export demand has given the US propylene business a lift.

Polymer grade propylene moving to Europe is fetching a higher price than that sold in the domestic market. While the US contract price for polymer grade propylene stands at 10 1/2 cents per pound or less, Hugh Pylant of Pace Consultants, Houston, says producers are now asking 11 cents per pound for export sales.

Joel Doerr of International PC, Inc., Houston, notes that tightening supplies of propylene in Europe has driven the price there up from 480 Deutschmarks per metric ton for third quarter contracts to a current spot price of 570 Deutschmarks per metric ton. To US suppliers, this is an increase from 11 cents per pound delivered to port to 13 cents per pound.

Several turnarounds at US cat crackers have tightened the domestic refinery propylene pool, but analysts contend that total domestic propylene supplies will remain high through the end of the year. Hugh Pylant projects that the feedstock slate in olefin units will assure high propylene output. Ethane, he says, should remain unchanged with about 40 percent of the feedstock total. Propane, however, is in extremely long supply and is expected to increase its share from 18 percent in September to 25 percent in December. At the same time, gas oil will decline in use as the approach of winter drives up heating oil #2 prices. Mr. Pylant projects that gas oil will fall from 23 percent of total feedstocks to 16 percent by the end of the year. Naptha will increase slightly from 18 to 20 percent.

While chemical and polymer grade propylene prices stagnate, the cutback in production at refineries have driven up the spot price of refinery propylene. Since early September, refinery grade propylene prices have risen from 7 cents per pound to the current 8 cents to 8 1/2 cents per pound range. However, by closing the differential between refinery material and chemical grade propylene, many refiners have realized greater value by putting the propylene in the dimer-sol and alkylation pools.

ACETATE FIBERS — Celanese Textile Fibers says it will boost prices for all compact acetate filament yarns by 5¢ per Continued on Page 21

PRICE HIGHLIGHTS

ALIPHATICS IN OCTOBER

	OCT.	SEPT.
(US \$)	(US \$)	(US \$)
Benzene.....lb.	.10 1/2	.11 1/2
Ethylene.....lb.	.14 1/2	.14
Ethylene Glycol.....lb.	.18 1/2	.18 1/2
Methanol.....gal.	.27-.28	.28
Propylene.....lb.	.8 1/2	.9 1/2
Vinyl Chloride.....lb.	.15 1/2-.16	.15 1/2

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Chemical Finance

Epolin's Shares Go on OTC Market

Shares of Epolin Incorporated, located at 293 Wilson Avenue, Newark, N.J., are now available to the public on the over-the-counter market. Epolin (a acronym for "Expanding Polymers for Industry") is planning commercial production of products based on polymerization of a novel class of monomeric materials, including spiro-ortho-carbonates and spiro-orthoesters which molecularly expand on polymerization rather than contract, as do most monomers the company says. The patent is owned by Prof. William J. Bellamy, at the University of Maryland, and is exclusively assigned to Epolin.

de Zoete & Bevan Says ICI Is Undervalued

Selling at a discount of 19 percent to the market averages, the shares of Imperial Chemical Industries PLC are undervalued and investors should avail themselves of the opportunity to purchase them at current price levels, according to de Zoete & Bevan, of London, New York, Hong Kong and Tokyo. Analysts Howard Coates, Jinky Price and Robin Hindle Fisher note that ICI is feeling the benefits of lower feedstock prices, favorable currency movements and strong end-use demand. ICI's share price should be about 11 times earnings instead of 9 times earnings as at present, the analysts stated.

Goodrich Issuing \$100 Million of Preferred

Directors of B. F. Goodrich Company, Akron, Ohio, have authorized the issuance of \$100 million of convertible preferred stock. Goodrich expects to file a registration statement shortly with Securities & Exchange Commission for the issue, which will be offered only by means of a prospectus. The dividend rate and the convertible features will be determined later. Proceeds will be used to reduce debt and for other general corporate purposes, Goodrich stated.

Goodyear Restructures Under Threat of Acquisition

Goodyear Tire & Rubber Company has retained the investment banking firm of Drexel Burnham Lambert, Inc., and Goldman Sachs & Co. to assist it in devising a restructuring plan that would maximize shareholder values. The move comes amid speculation that Sir James Goldsmith, an Anglo-French financier and corporate adviser, will attempt to take over the company. According to published reports, Sir James owns somewhat more than 15 percent of Goodyear's outstanding common shares.

Syntex Extends Stock Repurchase Program

Directors of Syntex Corporation, a diversified health care company based in Palo Alto, Calif., have authorized an extension of the company's recent common stock repurchase program, which began in late June 1986. Directors authorized the purchase in the open market or through privately negotiated transactions of up to 2 million additional shares over an indefinite period of time. This extends a 4-million-share repurchase program which was begun June 20 and completed in mid-October. Acquired shares will be held for the company's treasury.

Squibb to Repurchase 1 Million Shares of Stock

Directors of Squibb Corporation have authorized the repurchase from time to time of up to 1 million shares of the company's outstanding common stock. The shares will be held in the treasury and will be used for the company's stock option plans and for other general corporate purposes.

Squibb's directors have also adopted a merger defense amendment, commonly called "poison pill," consisting of stockholder rights that would be exercisable only under conditions indicative of a hostile takeover attempt.

Borden's Chemical Income Surges 68 Percent

Borden, Inc., a worldwide chemical division recorded a 68 percent increase in operating income in the third quarter, with domestic operations gaining 84 percent and international operations 26 percent, reports Eugene J. Sullivan, chairman and chief executive officer. All four domestic groups had higher earnings, with the biggest gain posted by the group that markets polyvinyl chloride resins. Mr. Sullivan stated. A percentage gain of 2,800 percent in PVC resin income translated into a very substantial dollar gain, the CEO further commented.

Du Pont Increases Dividend by 5 Cents

Directors of E. I. du Pont de Nemours & Co. have increased the quarterly dividend on the common stock by 5 cents per share to 80 cents, payable December 13 to stockholders of record, November 14. The boost reflects the company's improved earnings, consistently strong cash flow and "commitment to improve shareholder return," stated Richard E. Heckert, Du Pont's board chairman. Also declared were regular quarterly dividends on preferred issues.

Chemical Waste Management Completes Offering

Chemical Waste Management, Inc., Oak Brook, Ill., has completed an offering of 18.3 million shares of common in an initial public offering. Net proceeds of approximately \$309 million will be used to pay a cash dividend to Waste Management Incorporated and repay certain indebtedness to Waste Management, which retains approximately 61 percent of the company's 99.9 million shares of common stock outstanding after the offering.

Solvay Boosts its Holding in Laporte

Solvay & Cie, of Belgium, has acquired an additional 1,172,793 ordinary shares of Laporte Industries PLC, the diversified titanium dioxide producer headquartered in England, thereby raising its total holding to 22 percent of Laporte's ordinary share capital (common stock). Solvay has stated its intention to raise the interest gradually to 25 percent. The two companies are joint holders of Interco, a worldwide producer of hydrogen peroxide.

Hutton Still Neutral on IMC's Stock

E. F. Hutton & Co. maintains a neutral rating near and long-term on the stock of International Minerals & Chemical Corporation, Skokie, Ill. John P. Henry, Hutton's chemical analyst, believes the agricultural environment will cool down to depress the firm's earnings. Mr. Henry notes that operating earnings in fertilizers were down to \$1.6 million in the first fiscal quarter ended September 30, which included a special gain of \$1 million, as compared with earnings of \$24 million in the same period a year ago.

ALIPHATICS

Continued from Page 19

pound, and bike weaving twisted yarns prices by 7c. per pound. The increases take effect January 7, 1987.

DIMETHYL SULFOXIDE — Atchem, Inc. says it has increased its dimethyl sulfoxide prices effective November 1, 1986. Atchem says the increases are the first in two years and attributes them to higher raw material freight costs.

The new schedule for DMSO in drums are: 94c. per pound for drum container quantities (32.110 pounds); 96c. for truckloads sizes (minimum 24,076 pounds); 97c. for quantities ranging from 9,260 pounds to 23,613 pounds; \$1.00 per pound for orders varying from 2,315 to 9,267 pounds, and \$1.05 per pound for orders ranging between 463 pounds and 1,652 pounds.

ETHYLENE GLYCOL — Producers say an October 2c. per pound price initiative has been successful for industrial grade material, but not so for anti-freeze grade. Fiber grade product was not included in the price announcements.

Dow Chemical reportedly led the initiative (ENR, 8/15/86, pg. 58) on both products, but then backed off on anti-freeze grade. Producers say the increase was also set back for most accounts to October 15, the effective date later announced by Union Carbide, the largest glycol producer.

The anti-freeze increase is said to have failed because glycol producers with consumer product lines are not increasing retail anti-freeze prices. Most buying of anti-freeze product took place before October anyway, sources say.

There is some isolated resistance to the industrial grade increase, one observer says as PPG reportedly is waiting until November to increase prices to its accounts. Industrial accounts make up about 10 percent of the EG market.

Producers are now looking at industrial grade prices in the 18c.-to 19c.-per-pound range, f.o.b. Gulf production point. Anti-freeze grade remains at 16c. to 16 1/2c. per pound.

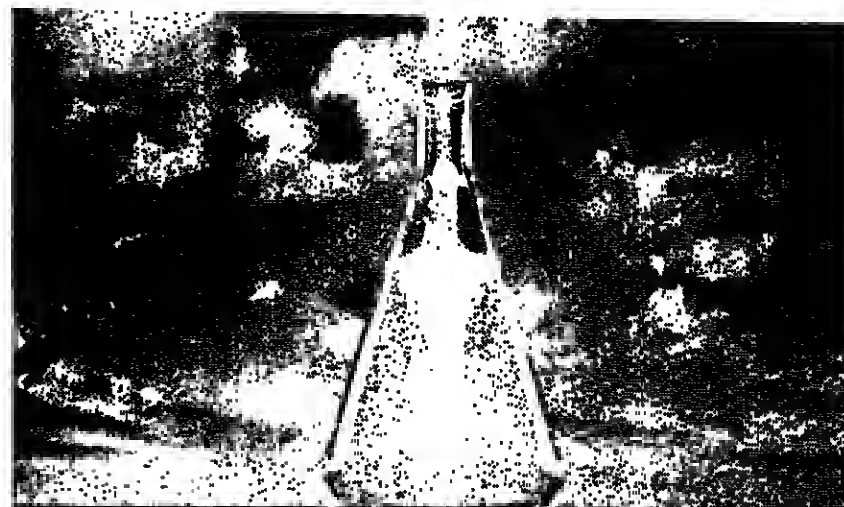
Producers are also reporting that ethylene oxide buyers are also accepting at least most of the 2c.-per-pound increase that was also asked for in October. Not all accounts have been settled here, however.

PERCHLOROETHYLENE — Dow Chemical USA has announced a 2c. per pound increase in its line of perchloroethylene products effective December 1.

The increase, which is not to exceed current list prices, affects "Dowper," "Dowper CS," perchloroethylene industrial and SVG and tetrachloroethylene USP grades.

A pure importer, who says he intends to support the price initiative, puts the current market price for industrial grade perchloroethylene between 16c. and 17c. per pound, f.o.b. tanks.

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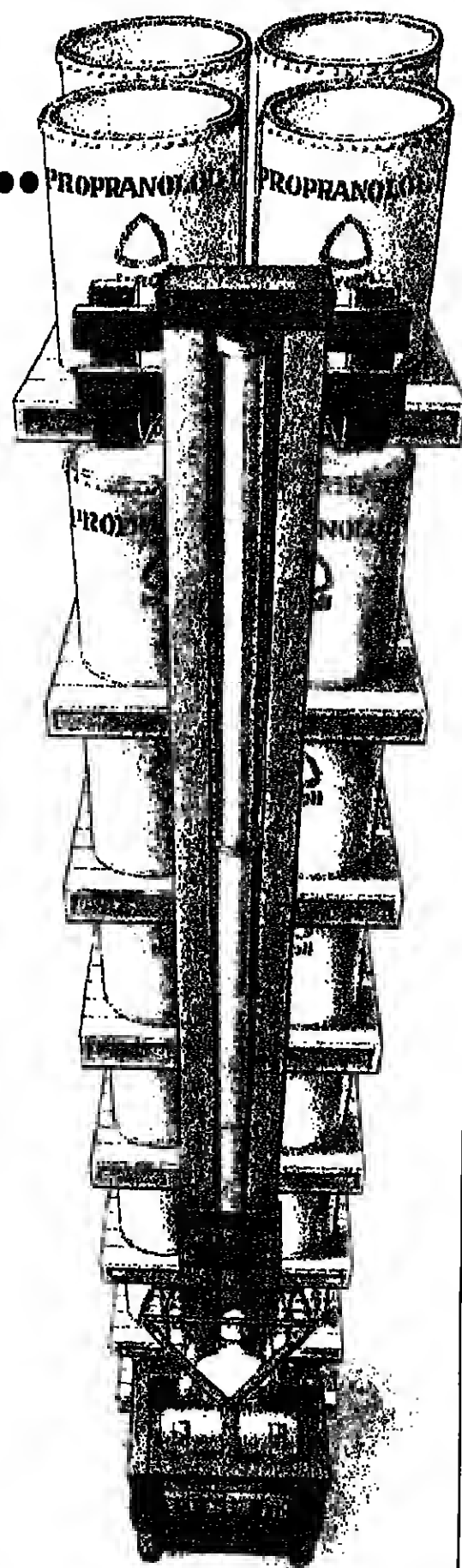
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CHEMICAL MARKETING REPORTER

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DRUGS & FINE CHEMICALS

Vitamin Price Hikes Posted By Roche and Takeda USA

Hoffmann-La Roche Inc., one of the US's leading suppliers of vitamins, recently announced several price increases, all effective November 1. In addition, late last week Takeda USA also announced multiple price hikes. The increases involve an array of vitamins, including many B-vitamins, vitamin C and vitamin H.

Most vitamins have been firming throughout 1986, a sharp reversal from the previous three years, which were characterized by market depression. Roche's move, however, marked the greatest number of simultaneous price increases.

Some observers believe Roche's numerous increases symbolize the industry's desire to match 1982 price levels. Prices are said to be rallying this year because of currency devaluation and increased demand.

The B-vitamin increases are: thiamine mononitrate USP, FCC and thiamine hydrochloride USP, FCC (both vitamin B₁), \$33 per kilogram for 100 kilograms, \$34.50 per kilogram for 20 kilograms. Fifty and 100-kilogram quantities for thiamine hydrochloride are in bulk containers. Riboflavin USP, FCC (vitamin B₂), is moving to \$48.50 per kilogram for 100 kilograms and \$50 per kilogram for 25 kilograms; 95 percent granulation of riboflavin USP will be \$50 per kilogram for 100 kilograms and \$51.50 per kilogram for 25 kilograms.

NEW SCHEDULES

Other B-vitamin increases are: niacin USP, FCC (nicotinic acid), \$6.50 per kilogram for 5,000 kilograms, \$6.75 per kilogram for 1,000 kilograms, \$7 per kilogram for 250 kilograms, and \$7.25 per kilogram for 50 kilograms; niacinamide USP and nicotinamide free flowing granular, \$6.50 per kilogram for 1,000 kilograms, \$6.75 per kilogram for 250 kilograms, and \$7 per kilogram for 50 kilograms; d-calcium pantothenate USP, FCC (vitamin B₅) \$12.50 per kilogram for 500 kilograms, \$13 per kilogram for 100 kilograms and \$13.50 per kilogram for 25 kilograms; pyridoxine hydrochloride USP, FCC (vitamin B₆), \$36 per kilogram in bulk containers, \$38 per kilogram for 20 kilograms.

BASF Wyandotte and EM Industries reportedly initiated many of these increases.

Other increases announced by Roche are: ascorbic acid (vitamin C) and sodium ascorbate, \$11 per kilogram for 400 kilograms, \$11.25 per kilogram for 100 kilograms and

\$11.50 per kilogram for 25 kilograms; calcium ascorbate, FCC, \$14 per kilogram for 500 kilograms, \$14.50 per kilogram for 100 kilograms and \$15 per kilogram for 25 kilograms; coated ascorbic acid 95 percent granules, \$11.45 per kilogram for 400 kilograms, \$11.75 per kilogram for 100 kilograms and \$12 per kilogram for 25 kilograms; Niacinamide ascorbate, FCC, \$13.50 per kilogram for 500 kilograms, \$14 per kilogram for 100 kilograms and \$14.50 per kilogram for 25 kilograms.

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

None

CHANGES/DOWN

None

DRUGS INDEX

The Drugs & Fine Chemicals Index reflects the prices of 10 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1986 211.8
Oct. 24, 1986 211.8
Oct. 3, 1986 211.8
Nov. 1, 1985 211.8

Chemical Prices Start on Page 46

per kilogram for 400 kilograms and \$10.50 per kilogram for 25 kilograms; ascorbic acid 95 percent granulation, \$10.30 per kilogram for 1,000 kilograms, \$10.50 per kilogram for 250 kilograms and \$10.75 per kilogram for 50 kilograms; ascorbic acid 95 percent granules, \$10.85 per kilogram for 1,000 kilograms, \$11.05 per kilogram for 250 kilograms and \$11.30 per kilogram for 50 kilograms; sodium ascorbate, meal grade, \$4.90 per pound for 200 pounds and \$5 per pound for less than 200 pounds. The prices are for product in bulk containers.

Roche is also raising its price for FCC (vitamin H) to \$5 per gram for 5 grams, \$8 per gram for between 100 and 500 grams, and \$8 per gram for less than 5 grams; 1 percent biotin trifluoromethane \$55 per kilogram for 100 kilograms and \$56.50 per kilogram for 50 kilograms.

A Roche spokesman says the company decided to examine its portfolio of vitamins in order to establish stable list pricing and, in turn, restore stability in the marketplace, along with other vitamin suppliers, as that pricing is still lower than it was in 1982.

DRUG & FINE CHEMICAL IMPORTS: AUGUST

CENSUS BUREAU REPORTS ON THE TOP DRUGS

	AUGUST	JULY	AUGUST	JULY
	QUANTITY	\$ VALUE	QUANTITY	\$ VALUE
Acetaminophen	428,431	1,000,448	382,774	988,129
Benzenoid drugs, n.s.p.	108,073	1,895,983	214,854	1,482,280
Brucine	—	—	78,000	137,000
Calciferol	—	—	—	—
Chlorine Acid	873,710	2,250,482	5,068,882	3,000,000
Cream of Tartar	3,878,940	2,442,417	192,811	9,871
D-pantothenic acid	288,531	188,288	—	—
Iodine, crude	198,070	748,782	492,085	1,080,500
Monosodium glutamate	206,238	1,188,982	143,498	8,871,000
Niacin, pharmaceutical grade	8,484,482	3,588,412	8,722,188	3,881,100
Nicotin G salts	132,278	308,283	143,498	3,871,000
Penicillin G n.s.p.	185,088	1,333,898	—	—
Phenylephrine HCl	10,989	735,028	143,498	3,871,000
Potassium sodium tartrate, (Rochelle Salts)	2,205	137,088	8,752	1,000,000
Quinine	55,180	38,808	40,000	89,000
Quinine and its salts	599,988	1,872,888	177,818	341,100
Saccharin	248,874	874,558	71,428	94,000
Steroid hormones, synthetic	178,784	348,172	86,274	1,775,000
Sulfamethazine	1,222,528	1,087,271	2,888,988	3,881,000
Sulfathiazole	111,853	489,888	141,218	318,000
Tartaric acid	33,730	177,887	—	—
Vitamin A	841,558	688,883	547,070	2,881,000
Vitamin B	248,988	1,877,887	421,898	841,000
Vitamin B ₁	78,423	878,153	35,900	1,880,000
Vitamin B ₂	188,988	2,682,318	118,000	841,000
Vitamin C	4,854	218,000	1,424,818	4,871,000
Vitamin E	1,187,473	4,228,881	468,788	1,881,000
Vitamin K, provitamin, etc., n.s.p.	220,581	1,280,888	133,358	1,881,000
Woolgrease, n.s.p.	11,074	108,113	382,888	1,881,000
	737,488	338,203	—	—

DRUGS & FINE CHEMS

Roche's price increases range from 5 to 10 percent.

Takeda USA also announced increases on several vitamins, all effective November 1. Thiamine mononitrate and thiamine hydrochloride are increasing to \$33 per kilo from \$31 per kilo; riboflavin USP is increasing to \$48.50 per kilo from \$46 per kilo; pyridoxine hydrochloride (vitamin B₆) is increasing to \$36 per kilo from \$33 per kilo; pure biotin will now be priced at \$5 per gram, and biotin 1 percent will now be priced at \$55 per kilo.

Takeda is also increasing ascorbate prices: ascorbic acid and sodium ascorbate are moving to \$11 per kilo from \$10 per kilo and direct compression grades of these two are also being increased on an equivalent basis. Also, calcium ascorbate is going to \$14 per kilo.

Takeda cites the need to return to profitability and changes in currency values as being behind the increase. The company also notes that supplies of many vitamins are somewhat tight because reduced profits are forcing the industry to work with lower inventories.

Because of the currency situation, brokers are now working the other side of the fence. Suppliers explain that instead of buying material in Europe and selling it in the US, brokers are now buying in the US and selling in Europe because European pricing is now higher. Therefore, US suppliers of vitamins are benefiting from brokers, rather than being undercut by them.

Currency aside, one spokesman claims that "demand is a close second reason" for rising prices. The US is the world's largest market for USP vitamins.

Players expect vitamin prices to remain stable for the rest of 1986, but some hint flooding could start again in second quarter 1987.

GENERIC — Generics continue to increase their share of the pharmaceutical market, said David Saks, drug analyst for Morgan, Olmstead, Kennedy & Gardner at a recent conference in New York. Mr. Saks claims that generics are heading toward a 50 percent market share, opposed to the current 12 percent.

percent market share, opposed to the current 12 percent.

He says that there are more than 100 recently off-patent prescription drugs with sales of more than \$6 billion. He also notes that most of the top 100 prescription drugs will come off patent within the next four years, with 1987 and 1989 the two biggest years. These phenomena, combined with the economic and political pressures in the market place, should cause rapid generic drug growth in the 1980's and into the 1990's.

Based on the categories of "past growth," "future growth," "profitability," and "research and development," Mr. Saks rates Lyphomed as the top generic firm, followed by Mylon and Zenith. Lyphomed and Zenith are also considered the two most improved companies.

Mr. Saks concludes that there are less business risks today than in previous years. This is because most generic firms have many products, rather than just one. He adds, though, that many doctors prefer "old" products to "new" ones, because of their familiarity. Also, familiar products are much less likely to surprise patients with their side effects, if any.

Chemed, Merck Agree on Sale

Chemed Corporation and Merck & Co. Inc. last week announced they have entered an agreed in principle for Merck to purchase substantially all of the business and assets of Chemed's wholly owned subsidiary, Vestal Laboratories, Inc.

Chemed expects to receive cash payments totalling approximately \$67.4 million from Merck over the next four years, the substantial portion of which would be paid at closing. Vestal Laboratories, headquartered in St. Louis, Missouri, manufactures and markets professional skin care products, disinfectant-cleaning products and instrument germicides to hospitals, nursing homes and general health care and other institutions and facilities.

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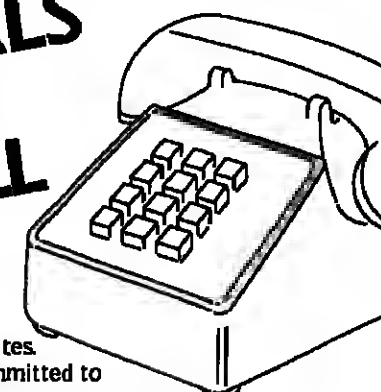
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Toxic Waste

Continued from Page 3

such as incineration, are expected to become the primary means of disposing of hazardous waste in the future, as the agency phases out land disposal of many toxic wastes over the next five years.

Waste minimization can be accomplished through changes in manufacturing or operating processes (called source reduction) and through recycling of product or waste components. The agency found that initial source reduction can be accomplished through better internal management of production processes and company operations.

"We discovered that by far the most significant first step a company can take to reduce its hazardous waste production is implementing a number of 'good housekeeping' practices, such as preventing spills, leaks and the unnecessary mixing of hazardous with non-hazardous components," said Mr. Porter. "Many of these simple steps can achieve a significant reduction in waste produced."

"However, as waste disposal costs increase, companies are beginning to implement more complex technological changes in manufacturing processes. We want to encourage this effort across industry segments through the development of our Federal information transfer and technical assistance program," Mr. Porter noted.

Good housekeeping practices also could include reviewing internal management procedures to identify initial steps which could be taken to reduce the amount and toxicity of wastes, such as source reduction and recycling potential; segregating hazardous from non-hazardous waste streams; improving inventory control, such as separating hazardous from non-hazardous substances; and training employees in better handling and control of hazardous substances and waste.

EPA said technology modification appears to be the most promising source reduction technique of the future for highly automated, large-volume production lines. In a chemical process, catalyst selection and process design continue to have the most direct effect on waste volume.

Hazardous waste recycled in the greatest volume are waste streams with constituents that can be reused in large-scale operations. This was the method of recycling used by the three manufacturing industries which accounted for 89 percent of the total volume of hazardous waste recycled in 1981: the transportation equipment industry, which recycled wastewater treatment sludges from electroplating and from chromium plating solutions; the chemical and allied products

industry, which recycled spent acids and alkaline solutions; and the primary metals industry, which recycled pickle liquor, a corrosive, metal-bearing waste.

Cost savings for waste reduction methods have been significant: for example, a facility in the chemicals and allied products industry has reprocessed spent acetone at a cost savings of \$72,000 a year. A facility in the electrical appliance industry substituted a water-soluble cleaner for the solvent trichloroethane (TCE) and recycled used TCE to achieve a 30-percent reduction in waste at a cost savings of \$35,000 a year. Another facility in the paper and allied product industry recovered vaporized solvent for a yearly cost savings of \$1.8 million a year.

In another case study, a facility in the metal finishing industry achieved a 80-percent reduction in waste by recycling nickel plating solution and a 50-percent reduction in cyanide and copper wastes by substituting a chemical cleaner.

The data also indicate that of the 266 million metric tons of hazardous waste generated annually, the chemical industry produces 180 million, or 68 percent.

EPA's soon-to-be-developed computerized data base on waste minimization activities will be available to states and the general public. As part of its technical assistance program, the agency will develop technical information and will provide interested companies with names of state and Federal government experts in specific waste reduction activities.

Textile Deficit Hits \$15.9 Billion

Imports of textiles and apparel for the first three quarters of the year hit a record level, the American Textile Manufacturers Institute reported Thursday.

In figures released by the Department of Commerce, textile and apparel imports reached 9.8 billion square yards for January-September, a 20.5 percent increase over the same period last year. Imports of textile and apparel in September declined 6.2 percent from September 1985.

The textile and apparel trade deficit for the first three quarters of the year reached \$15.9 billion, an increase of 17 percent over last year's record level. The textile and apparel trade deficit is 12 percent of the nation's total merchandise trade deficit.

ATMI President Dewey L. Trogon said, "There is no question that textile and apparel imports are a major national problem that is not going to go away. The 20.5 percent growth for the first 9 months of the year alone represents almost 200,000 job opportunities lost for U.S. workers."

"September's slight decline in imports is not unexpected because some countries have filled their quotas very rapidly this year, disrupting our market."

"The 9.8 billion square yards of textile and apparel imports that entered the U.S. during the first three quarters of this year are nearly as high as the total textile and apparel imports level for all of 1984," he said.

"Since 1980, the industry has seen one record year of imports on top of another. The trend continues and the overall trade figures make it clear that the American fiber, textile, and apparel industry must have a legislative solution to this problem," Mr. Trogon said.

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Paint Spray Costs Seen Skyrocketing With High-Solids

As manufacturers with paint spray booth operations convert to high solids paint, their booth treatment costs are skyrocketing. It used to be that chemical treatment could cost as little as a few pennies per job. Now manufacturers are faced with treatment costs typically ranging from \$0.75 to \$1.50/gallon of overspray paint—\$1 per job or higher.

These higher costs reflect the many problems associated with the use of base/clear coat, or other high solids paints: increased deposition, more frequent booth balance and stack emissions problems, and more difficult and costly sludge handling, according to Carmine Sarno, assistant vice-president and director of engineering for the automobile industry at Betz Laboratories, Inc.

"Focusing on cost savings in one area can be misleading," warns Mr. Sarno, "because it may be costing you more in other areas. Instead, look to your bottom line when comparing different programs. A high return on your investment should always be expected."

Of all the tangible treatment costs, operating expenses—such as temperature control, lighting, fans, etc.—are the only relatively fixed costs.

"Chemical costs are variable and depend on a number of factors like paint type," says Mr. Sarno. "Our costs average from under \$1 to \$1.50 per gallon of overspray base/clear or high solids enamels. This figure includes defoamers, antifoams and sludge conditioners."

Maintenance costs vary depending on the treatment program and typically include daily cleaning of booth grates and walls, spray guns, paint lines and robotics, as well as periodic cleaning of the snips, stack/fan, pumps, etc.

The most common method of sludge disposal is landfilling. Mr. Sarno estimates that non-hazardous sludge disposal costs range from \$25 to \$75 per cubic yard and hazardous sludge from \$50 to \$150 per cubic yard. Solidification costs of liquid waste can add 20 percent to 40 percent to the disposal. Normally, these costs are site-dependent and some variation is expected since all states have different regulations.

"Many people feel that sludge disposal is one area where money can easily be saved," says Mr. Sarno. "However, a chemical program aimed at reducing daily sludge disposal costs may do so at the expense of increasing long-term maintenance costs."

"Choosing the wrong treatment program results in poor efficacy. This means more

live paint deposits in the system which increases maintenance costs. A highly-effective program results in completely killed paint, well-controlled sludge handling and less deposition in the system. Thus, maintenance costs are lower.

"In both cases, long-term sludge disposal costs essentially remain the same. If the sludge is not removed from the system on a daily basis, it will have to be removed during one of the large scale periodic cleanouts. The annual sludge volume and disposal costs are relatively unchanged."

Sarno cites an example of looking to the bottom line for a return on investment in which the overall spray booth chemical treatment costs of one automotive manufacturer were \$350,000 per year. The treatment

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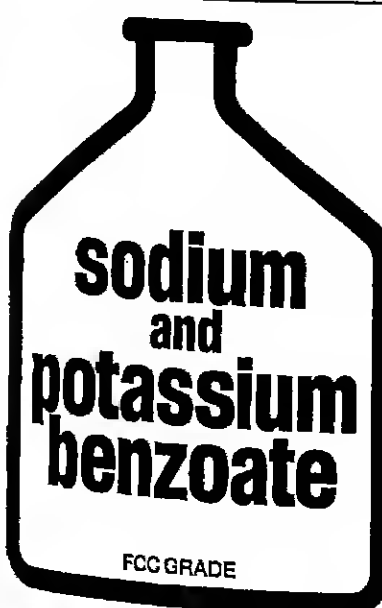
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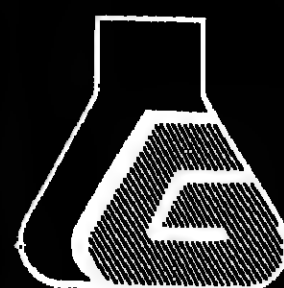
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program reduced weekend booth maintenance manpower from 33 to 8 men—an annual savings of about \$250,000; cut nightly outside contractor cleaning by half—an annual savings of about \$100,000; and reduced dumping and pit cleaning frequency from 3 weeks to 20 weeks—an annual savings of \$500,000. In addition, the treatment program was \$150,000 less per annum than the previous program. However, annual sludge disposal costs were unchanged, despite the change in chemical treatment program.

To this case, reduced maintenance alone saved the manufacturer about \$1 million. This resulted in a 3 to 1 return on chemical treatment costs.

"Added to that were other related savings that further increased the ROI," Mr. Sarno says. "Including freight and drum handling reductions, energy savings in water reuse and filter media savings."

Mr. Sarno mentions other factors that should be considered in the ROI formula. Included are improved system reliability and less downtime, improved working environment, optimized scrubber efficiency which results in reduced stack emissions and balance problems, extended equipment life and consistent product quality.

"The best chemical treatment programs, in the final analysis, will usually cost nothing," says Mr. Sarno. "They should pay for themselves by the savings realized in other areas. Overall savings will not result by con-

centrating on just sludge disposal, maintenance or chemical costs. Because of this interdependency, proper attention to all areas and selection of the best program will provide manufacturers with the lowest bottom line costs and the highest return on the investment."

Carbide's

Continued from Page 4

have — by cutting capacity, moving into new products, investing in new technologies and forming new partnerships.

"Many Japanese firms that had limited interest in direct investment abroad," Mr. Kennedy added, "now operate plants in the US. We're going to see a lot more of that in the future as Japanese chemical companies diversify into areas such as pharmaceuticals and biotechnology, where American companies have solid beachheads."

Others, he said, will be forced to get production facilities or partnerships to close to their out and electronics customers who are investing in US facilities.

"I sense an emerging consensus to open up the economy and make foreign investments abroad," Mr. Kennedy told the Tokyo gathering. "The better the decision, the better it will be for all."

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Methylene Chloride Needs Better Study, Industry Asserts

In assessing the risk of methylene chloride, the Consumer Product Safety Commission should use the available pharmacokinetic data to provide a better assessment of human risk, American Industrial Health Council said last week.

"CSPC should incorporate available pharmacokinetic data on DCM consistent with the increasing recognition in the scientific community that pharmacokinetic data should be reflected in risk assessment, including the choice of modeling procedure, where such data are available," AIHC said in comments filed with the agency.

The industry group says it believes that in assessing substances such as methylene chloride, the overall pattern of data provides reasons to depart from ultra-conservative upper confidence limits. Use of pharmacokinetic data in the risk assessment process will provide a better scientific basis for making a decision, says AIHC.

The council says it disagrees with the agency's use of 95 percent upper confidence limits in the methylene chloride assessment process because these limits "proved the decision-maker with a 'worst-case' prediction of risk that can be many times higher than the most likely estimates of risk."

In its comments, AIHC "commends CSPC for recognizing that regulatory decisions on methylene chloride should be based on a comparative risk assessment."

The group also says it supports the CSPC staff recommendations to convene a chronic hazards advisory panel, since interdisciplinary scientific peer review is a primary

tool for ensuring high-quality risk assessment.

AIHC also notes that the high spontaneous incidence of mouse liver tumors and lung tumors in the test animals casts doubt on the relevance to humans of these test data.

It advises that the risk assessment should include a discussion of the epidemiologic data as a check on the risks predicted by the model used, and says CSPC should not aggregate benign and malignant tumors in arriving at a quantitative prediction of risk posed by methylene chloride.

CSPC approved and published in August a proposed rule on methylene chloride that could result in a declaration that household products containing the chemical are hazardous substances requiring special labels. However, the rulemaking process will probably take two to three years to complete.

In a related development, the Hologated Solvents Industry Alliance has asked Food & Drug Administration either to terminate its rule banning methylene chloride's use in cosmetics, or to reopen the comment period on the rule.

The alliance of methylene chloride manufacturers told FDA that the cosmetic uses of the chemical are almost non-existent, therefore "no benefits would flow from regulating this particular situation."

The trade group also noted that FDA's determination that methylene chloride's cosmetic uses are dangerous would invite lawsuits by manufacturers and users of the chemical in other products.

"When all available scientific data are considered, the data indicate that methylene chloride is unlikely to present any significant human cancer risk," said HISA.

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Henley and ABM Charged by CCL

Contract Chemicals Ltd. a UK-based independent chemical manufacturer was granted a temporary restraining order by a New York County Superior Court judge on October 22 against Henley & Co. Inc. of Montvale, N.J., a subsidiary of the German pharmaceutical producer Boehringer Ingelheim, and ABM Chemicals Ltd. of Stockport, England, a recently acquired subsidiary of Rio Tinto Zinc, the metals and chemicals multinational.

In the complaint before the court it is contended that Henley, while acting as CCL's agent in the US, was also negotiating to act in the US for ABM Chemicals Ltd., CCL's main competitor. CCL had at Henley's request supplied confidential information to Henley about its products, including price lists, uses, customer lists and specifications, and CCL alleges that this information could be used for ABM's benefit.

CCL alleges that it discovered the relationship between ABM and Henley by accident, when a routine telephone call to one of its US customers revealed that Henley had sold an ABM product which is also made by CCL to the customer. Costs are being claimed for time and expenses in having to interview, appoint and train new agents caused by Henley's "sudden abandonment" of CCL.

Squibb Vaccine To Battle New Strain

E.R. Squibb & Sons, will introduce a monovalent vaccine for protection against a newly identified strain of influenza that has been implicated in outbreaks among children and young adults in Asia.

The current trivalent vaccine which had

been developed for the current flu season, had been shown to be largely ineffective against the newly identified strain. While most influenza strains are identified by the Centers for Disease Control in March before the start of a new flu season, this particular strain, identified as Type A/Taiwan, was not identified until July of this year.

Squibb is providing the vaccine in response to a request by the CDC for vaccine manufacturers to begin production of a supplemental vaccine for use before the 1988-89 flu season. The vaccine will be available early in November.

Linda C. Wase, M.D., medical director of E.R. Squibb & Sons, US says, "While no one can predict whether the new strain will cause major outbreaks in the US this year, it seems prudent for those individuals who are at risk of developing serious complications from influenza to receive the new monovalent vaccine in addition to the current trivalent vaccine."

IBA Elects Board For 1986-87 Year

The Industrial Biotechnology Association has elected its officers for the 1986-87 year, and increased its board of directors to 15th Annual Members' Meeting.

Officers are: Dr. George B. Rothman of Amgen, chairman; Hugh A. D'Andrea of Schering-Plough, vice-chairman; Dr. John Norell of Provesta Corp., Phillipa Petroleum, secretary; Dr. Jerry D. Caulder of Myogen, treasurer; and Richard D. Godwin, president.

Other directors on the board are: Dr. Ronald E. Cape, Celus Corp.; Dr. L. Parodi Gage, Hoffmann-La Roche, Inc.; Robert A. Swanson, Genentech, Inc. Elected to the IBA board of directors for the first time were: Dr. Will D. Caryenter, Monsanto Co.; Dr. Ralph E. Christoffersen, The Upjohn Co.; Dr. Nicholas M. Frey, Pioneer Hi-Bred International, Inc.; Dr. Ralph W. F. Hardy, E. Technica International, Inc.; Dr. David Jackson, E.I. du Pont de Nemours & Co.; Hubert J.P. Schoemaker, Centocor; and Dr. Karl H. Voepel, Miles Laboratories, Inc.

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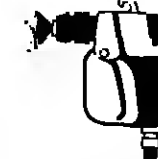
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Chemical Marketing Reporter



COATING
MATERIALS '86



Solvent Rules Spur New Auto Finishes



EPA's Standards on Solvent Emissions
Have Us Auto Makers Scrambling
To Beat the '87 Compliance Deadline

By OWEN KEAN

Car makers have until next year to comply with solvent emission standards implemented under the Clean Air Act, so the heat is on to produce attractive auto finishes at minimum pollution levels.

To comply with these regulations, auto makers and their paint suppliers have shifted their coatings technologies from solvent-based lacquer paints to high-solids, reduced solvent content base coat/clear coat technology.

Frederick F. Rhue, vice-president of automotive and industrial finishes for the coatings and resins group at PPG Industries, Inc., a major coatings supplier to the auto industry, says high-solids base coat/clear coat finishes now account for more than 50 percent of US auto topcoats.

This topcoat system consists of a highly pigmented base coat, mostly a high-solids acrylic resin, and a protective clear-coat on top, also acrylic-based, that adds luster and protection to the finish.

Mr. Rhue says Chrysler, American Motors and the US-based Japanese makers finish all their autos with the base coat/clear coat technology.

Ford has converted nearly 100 percent to base coat/clear coat, while General Motors still has substantial dispersion lacquer paint systems in place.

GM PHASES OUT LACQUERS

Joseph Piazzon, director of paint for GM's Buick-Oldsmobile-Cadillac group, says GM is phasing lacquer-based paints out on its assembly lines. He says the company has no timetable for replacing lacquer coats, other than as individual assembly lines are taken out of production for renovation.

Base coat/clear coat systems are currently solvent-based, but their high-solids content sharply reduces solvent levels. In addition, improvements in paint and process technology enable car makers to put on thinner coats, thus lowering paint consumption and reducing solvent use. Coatings are also being applied more efficiently, so less paint is wasted, and again, less solvents are allowed into the atmosphere.

While the acrylic-based base coat/clear coat systems have become the state-of-the-art in auto finishes, recently developed waterborne base coats are mounting a challenge to high-solids' market leadership.

Waterborne base coatings developed by Imperial Chemical Industries PLC and BASF Inmont are both in advanced stages of development, and both could be in commercial use in the next car model year.

ICI calls its coating system "Aquabase" and describes it as a "microgel technology (that) binds groups of water molecules together," with the paint

US auto makers and their paint suppliers have shifted coatings technologies from solvent-based lacquer paints to high solids, reduced solvent content, base coat/clear coat systems. PPG Industries, Inc., one of the industry's largest suppliers of automotive coatings, says the new technology now accounts for more than 50 percent of US auto topcoats.

Coatings '86: A \$10 Billion Market Is In View

AUTOMOTIVE: High solids, base coat-clear coat technology is taking over Page 29
WASHINGTON: EPA is taking a hard look at a widely-used marine antifoulant Page 32
RESIN VEHICLES: Latex makers claim products now equal solvent systems in many ways Page 33
SOLVENTS: The industry is formulating away from materials that may pose hazards. Page 34

FINANCIAL: Paint makers expect shipments to be up about 5 percent in 1986 Page 35
PIGMENTS: Consumers are looking for ways around high titanium dioxide costs. Page 36
POWDER COATINGS: Double-digit growth is predicted for the market. Page 38
COIL COATINGS: Growth opportunities in home appliances should bolster the market. Page 39

COATING MATERIALS '86 AUTOMOTIVE FINISHES

encapsulated in small "blobs" of water.

ICI says the coating has a high viscosity level, so the paint can be applied in thin films, thus allowing the aluminum particles in metallic coatings to be applied smoothly and evenly. ICI says its "Aquabase" system reduces solvent emissions in the base coat by 70 percent, compared to high-solids formulations.

"Aquabase" has been licensed to PPG and Du Pont in the US. ICI says GM will begin using base coat at its Oshawa, Ontario, truck and bus assembly plant this month, while it is supplied by ICI's subsidiary, C-I-L Paints, Inc.

Tougher emissions standards in Europe have prompted Volvo, Volkswagen, BMW, and Opel to all test the product.

Mr. Plazon at GM predicts that waterborne base coats will be commercially used in the US in the 1988 car model year. He says waterborne base coats maintain the "glamour" look of the paint finish, while staying within volatile organic compound (VOC) emission standards.

By contrast, Mr. Plazon says that with solvent-based high-solids base coats, "as you increase the solids content, there are indications you lose the ability to get ultimate glamour. If you go to high solids for (solvent emission) compliance, you sacrifice glamour." He adds that in other aspects, such as cost, the two base coat formulas are equal.

The major drawback with waterborne base coats, however, is that the paint must fully dry before the clear coat can be applied.

ICI says "Aquabase" requires three minutes in a drying tunnel, compared to one minute for high-solids base coats. This means that the tunnel must be tripled in length, or a log jam will be created along the assembly line. ICI says it is working to cut the drying time in half.

GM's Plazon says it would be "ideal" if the waterborne coatings "flashed" (dried) in three minutes. However, he says "It has been our experience that it takes longer" than that, creating the need for even larger and longer production facilities. He says waterborne systems are not easily adapted to existing auto assembly spray booths.

Another problem with the waterborne system, ICI concedes, is that stainless steel pipes are required in the paint booth to prevent



AUTO COATINGS: Solvent emissions are being reduced in automotive coatings through use of high solids systems and advanced application techniques.

corrosion. Solvent-based paints do not have this requirement. As a result, ICI foresees the introduction of waterborne base coat systems coinciding with new or renovated assembly lines.

Another problem with waterborne paint is that the atmosphere of the spray booth must be controlled to ensure a constant evaporation rate, according to Sam Mills, process and systems manager for body assembly operation at Ford Motor Company.

In certain parts of the country, particularly the South, high humidity could significantly slow the paint's drying time, he claims. To rectify this, auto makers will have to install "very expensive" cooling systems in the booth, Mr. Mills says.

Inmont (which was acquired by BASF last year) has been using waterborne paint for cars built in California since the early 1970s. Inmont has painted 5 million cars in California using waterborne paints to meet the state's rigorous solvent emission standards, according to a company spokesman.

While water-based coats did not exist nationwide until recently, BASF Inc. with the help of Mobay Corporation, has developed a new base coat/clear coat topcoat system that has attracted great attention in Detroit.

POLYURETHANE SYSTEM

BASF Inmont's system combines a waterborne base coat with a two-component polyurethane clear coat. Mr. Mills at Ford says the two-component polyurethane clear coat is more durable than existing acrylic clear coats.

BASF Inmont, which has tested its system at GM's Corvette plant in Bowling Green, Ky., says its system requires a very thin film base coat which can be dried in three minutes, thus cutting down on release of the spray booth. Also, BASF says the paint cures at lower temperatures than conventional systems, thus cutting energy consumption.

Dr. Volker Mergel of Mobay says the two-component polyurethane clear coat has higher chemical resistance and greater abrasion retention than conventional acrylic finishes. The system works by reacting a polyurethane with polyisocyanate in the spray gun. BASF supplies these raw materials to BASF Inmont. Urethane coatings are already widely used by car makers on lower body parts to prevent paint chipping caused by flying stones.

As a clear top coat all over the car, Mr. Mills favors polyurethane for "having better durability against industrial and road salt" than acrylic clear coats.

It withstands the rigors of "squeaked insects and other contaminants," he says. GM's Plazon says the "very good" and durability of the two-component polyurethane clear coat is "very good."

Mobay's Dr. Mergel says the two-component polyurethane clear coat is used on models, and BMW has recently used it in one assembly line. BASF

Continued on Page 40

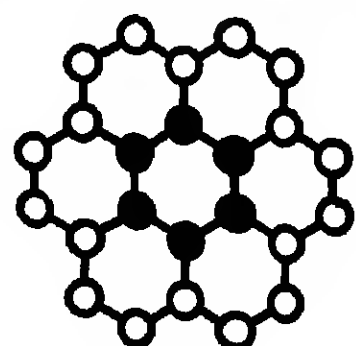
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COATING MATERIALS '86 WASHINGTON

EPA Takes Hard Look At Marine Antifoulants

By GLENN HESS

Environmental Protection Agency says it expects to decide before next summer whether it will temporarily suspend the use of certain tributyltin-based antifoulant marine paints on all commercial and recreational vessels.

EPA is studying the effects of those paints amid pressure from some researchers who say deformities in European shellfish and

laboratory evidence warrant an immediate ban on the material.

Tributyltin, or TBT, is a popular and effective marine paint additive that prevents barnacles and similar sea creatures from latching onto boat bottoms and causing reduced fuel efficiency and frequent — and expensive — drydocking to have the hull scraped.

The Navy has indicated a desire to paint its entire fleet with TBT paints, estimating a \$5 million annual reduction in the cost of hull cleaning and a 15 percent annual savings in

fuel consumption due to a reduction in the drag caused by fouling organisms.

In addition to the \$150 million annual savings, the Navy notes that copolymer TBT antifoulants have a lifespan of six to seven years while freely associated TBT or copper-based paints last approximately two years, further reducing the cost of hull maintenance.

However, some researchers believe TBT paints may be too effective because the chemical has been shown to have lethal and sub-lethal effects on molluscs, such as oysters, and other, non-target organisms.

TBT has been called the most toxic substance ever deliberately introduced into the marine environment, and it is these other, unintended, effects on marine life that have caught the attention of Federal investigators.

"Recent research on TBT is posing better some questions on the chemical's impact beyond its stated use," says Rep. Walter Jones (D-N.C.) chairman of the House Merchant Marine and Fisheries Committee.

"We now know that it can have serious consequences — at extremely low levels — for valuable fisheries resources such as oysters. Its effects on other marine life and on those further along in the food chain — the consumer of affected seafood — is currently unknown," he says.

Last January, EPA began a special review of the nine most common TBT antifoulant paint formulations to determine their effects on non-target organisms. The first step of this review — and its current status — is to request data from TBT paint manufacturers. The EPA study may take from three to five years to complete.

While the agency fills in the data gaps, John A. Moore, EPA assistant administrator for pesticides and toxic substances, says it may be necessary to impose interim restrictions on TBT paints until the comprehensive study is completed. He says a decision will probably be made in March or April.

At a congressional hearing on the TBT controversy, Robert J. Huggett of the Virginia Institute of Marine Science at William and Mary College, said he became curious about paints containing TBT when he used one on his boat.

"It was so effective, I wondered why," he told the House Merchant Marine and Fisheries oversight and investigations subcommittee. "I thought I should take a closer look."

"A ban on all tin-bearing paints in US waters would create economic havoc..."

He notes that after suffering a nearly 15 percent incidence of Pacific oysters with severe shell deformities in Arcachon Bay, France in 1981 banned the use of TBT paints on all vessels less than 80 feet in length.

Unusually thick shells with a ball shape rendered the French oysters unmarketable because of their odd shape and the small amount of meat they contained. Two years after the ban, Mr. Huggett said deformities had been cut in half and settlement of new oysters had increased dramatically.

Both Japan and England have banned a limited use of certain TBT products.

Although no effects have been discovered in oysters along the East Coast of the US, Mr. Huggett says laboratory tests have revealed that TBT can have toxic effects on shellfish larvae.

"Since some of the reported toxic effects are in the part per trillion range and the probability that some may have been underestimated, it is prudent to exercise extreme caution when evaluating the costs and benefits of TBT in antifouling paints," Mr. Huggett advised the lawmakers.

Asserting that TBT from recreational vessels has contaminated a major portion of Chesapeake Bay, Mr. Huggett says he believes the available evidence is sufficient to warrant some sort of restriction. "I believe the potential is there to cause some serious harm," he says.

Lenwood W. Hall, Jr. of Johns Hopkins University says he agrees that the use of TBT coatings presents potential environmental problems to non-target aquatic organisms.

He says results from various laboratory toxicity studies have shown that TBT is acutely toxic to sensitive estuarine aquatic life at extremely low concentrations.

"These compounds may cause potential environmental problems in the Chesapeake Bay as the use of TBT paints on recreational and commercial vessels has been increasing in recent years," Mr. Hall says.

It has been estimated that organisms in antifouling paints are used by 20 to 30 percent of all large commercial vessels that use the Maryland waters of Chesapeake Bay.

Continued on Page 40

COATING MATERIALS '86 RESIN VEHICLES

Latex Systems Gain At Solvents' Expense

By STEPHEN KEARNEY

Environmental concerns continue to stimulate use of latex systems in the architectural coatings industry, at the expense of solvent-based systems.

According to Stanford Research Institute, the two most widely used resins for architectural coatings last year were acrylic and vinyl, both of which are used in water-based, or latex, systems.

Vinyl resins accounted for 32.5 percent of the market, acrylic resins 28.3 percent, and alkyd resins, used in solvent-based systems, held a 23.9 percent share of the market last year, according to SRI.

SRI's Laboratories expects use of latex resin systems to grow at an average annual rate of 2 percent over the next five years, compared to solvent-based systems, which could see a slight decline.

Latex paints are easier to produce because of their lack of effluent problems, and easier to handle because they are odorless, non-flammable, and removable without the need for thinners.

The movement toward water-based systems is both "highly desirable from an ecological point of view," according to Peter V. Robinson, associate director of polymer and coatings research for Glidden Company, and "economically desirable" in terms of relative costs. In addition, he asserts, the performance of water-based paints is now in many ways equal to that of solvent-based systems.

According to one coatings maker, "latex resin paints generally work on any surface, have excellent durability, and have a longer serviceability life than conventional solvent paints."

Latex resins perform very well on aluminum, adds another source, and outperform solvents in adhesion to galvanized iron.

Still, solvent paints have their adherents. The reason many customers continue to use solvent-based paints, according to one maker, is that "water fails on them" in matters of adhesion, spotting, and water resistance.

With water-based paints, he continues, there are limitations on application conditions related to high humidity and low temperatures.

There are substrate problems involved in painting over a solvent-based coat that may require the use of a solvent-based primer to seal adhesion and then two coats of latex top coat before approaching one coat of solvent top coat to performance characteristics.

One resin supplier observes that solvent-based systems "still have some specific advantages in stains, high-gloss paints, and ad-

hesion characteristics." Others note that solvents penetrate into wood better than latex for such applications as deck paints.

According to Sherwin-Williams Company, in deciding which resin to use, customer preference plays a role: "Some customers are very loyal to solvent-based paints," says a spokesman.

Though acknowledging that improvements in latex paints have been gradual,

Glidden's Robinson says that, taken incrementally, progress during the past 5 to 10 years in controlling the ability of water-borne paints to flow under various conditions has been fairly substantial.

One area of latex advancement involves high-gloss paints. Rohm and Haas Company, the leading acrylic resin supplier, has been promoting resins for high-gloss applications that "give you another dimension," according to one coatings manufacturer, because previously one "couldn't quite get up to a high gloss" with a latex resin.

One coatings supplier says that one of Rohm and Haas' high-gloss products retains gloss longer than a conventional alkyd resin, but does not start out as glossy. Another Rohm and Haas high-gloss resin reportedly

performs better in a salt spray chamber test than other water-based products, but not as well as most solvents.

"High gloss is a nut every latex manufacturer would like to crack," says the source, but the problem is that latex and solvent paints are chemically different. "With the latex, you get a continuous, seamless film."

Other concerns that latex makers are said to be addressing are rust inhibition and stain suppression. Rust is often a problem in painting over wood where nails are used, as the water-based paint can corrode the nail. Staining occurs when coloring materials, such as those in raw lumber, come through the paint.

Where latex paints are used in exterior Continued on Page 40

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ARCHITECTURAL MARKET: Performance of water-based paints continues to improve and is now in many ways equal to that of solvent-based systems.

Journal of Chemical Engineering

COATING MATERIALS '86 SOLVENTS

Solvent Makers Eye Compliance Deadline

By RONALD BEGLEY

The solvents industry is busy reformulating away from oxygenated solvents which pose potential health risks to workers. At the same time, it is moving more and more heavily into high solids and waterborne technologies.

This move, along with the developments in oxygenates, is part of an effort to meet next year's deadline for compliance with the

EPA's regulations concerning emission of volatile organic compounds (VOC's).

Propylene glycol-based solvents are becoming increasingly popular within the industry. Spurring the growth in these products is increasing industry awareness and concern over widely publicized scientific studies showing toxicity of ethylene glycol monomethyl and dimethyl ethers (EGME and DMGME) and their acetates. The products have been shown to cause birth defects and testicular damage, and have been steadily losing

ground in the market over the past few years.

The switch to oxygenated solvents in general was itself initiated by the need for compliance with the Clean Air Act's demand for the reduction of VOC's in the atmosphere.

The resulting turning away from hydrocarbon-based solvents led the way into increased use of high solids and waterborne technologies. In these areas oxygenates have found wide utility.

At the same time, the toxicity problems associated with EGME and their acetates have become more apparent, and the move away from them more extensive.

Picking up the slack left by the removal of these important solvents is propylene glycol monomethyl ether (PM) and ethyl ethoxypionate (2-EEP). These materials, although traditionally produced in relatively small quantities, are currently growing rapidly at

SOLVENT EMISSIONS: The coatings industry is busy reformulating away from solvents which pose potential health risks to workers, while moving at the same time to higher solids and water-based technologies.

the expense of EE, EM and their acetates.

The propylene glycol ethers and their acetates perform very well in high solids coatings systems. High solids technology is an area that the coatings industry naturally gravitated toward when it became necessary to find alternatives to the traditional high solvent, conventional solids systems.

There is less of a technological leap involved in the switch to high solids than there is with a move to waterborne, powder or radiation-cured coatings systems, which all involve a greater degree of equipment modification and therefore, a greater amount of initial capital investment.

The resultant exploration of high solids technology has yielded coatings of solid content ranging from 50 percent all the way up to 85 percent. Use of high solids formulations is expected to grow at a rate of 6 to 7 percent a year over the next few years.

Various solvents have been growing in popularity in high solids formulations. Methyl amyl ketone has shown itself to be a good versatile solvent. Its growth, however, is expected to be stifled by problems with another growing concern in the coatings industry — odor problems.

AUTO PLANT DROPS SOLVENT

In one case an automobile manufacturing plant was forced to discontinue its use of methyl amyl ketone in new car finishes due to odor complaints by people living in the vicinity of the plant.

Hexyl acetate is also an effective solvent in high solids and has been growing along with high solids technology, according to Union Carbide marketing manager David Lee.

Carbide is preparing to introduce pentyl and butyl propionates to the solvent market. These new products offer high transfer efficiency, good solvent cutting power for resins and minimum odors, Mr. Lee says, making them attractive for the high solids end of the industry.

Waterborne technology, the other main alternative to conventional solids formulations, is experiencing significant growth. As with high solids, the use of PM and its acetate is growing in this area, at the expense of ethylene glycol-based solvents.

Members of the industry who have made the move to propylene glycol-based solvents have discovered some benefits with the waterborne technology, according to Arco's John Quinlan, marketing manager for "Arco-solv" solvents.

He points out that the main benefit in enhanced resin systems has been found with propylene glycol ethers, thus improving shelf life while maintaining product quality, he says. Mr. Quinlan expects to see double-digit growth in propylene glycol-based solvents over the next few years.

Major growth areas for waterborne coatings are in architectural and industrial markets.

Continued on Page 40

COATING MATERIALS '86 FINANCIAL

Coatings Men Primed For 5 Percent Gain

By JAMES GUBITOSI

More than 1,200 companies comprising the US coating industry are raising their gallonage shipments this year by about 5 percent to an estimated 940 million gallons, while dollar volume, swelled by 7 to 8 percent average price increases in the architectural paint segment, should reach just about \$10.1 billion.

Following the acquisition of Inmont Corporation from United Technologies Corporation by BASF AG of West Germany late in 1985, two important acquisitions occurred this year.

The purchase of Ford Motor Company's automotive paint facilities by E.I. du Pont de Nemours & Co. puts Du Pont in closer contention with BASF and PPG Industries, Inc. Thus, the automotive coatings industry has so closely followed the pattern of consolidation in the industry it serves that the Big Three auto makers are now supplied by a Big Three coatings industry.

In contrast, the architectural paint industry remains as decentralized, diverse, localized, individualistic and personal as ever. Here, over 1,200 paint makers move their products into hundreds of thousands of local outlets.

Imperial Chemical Industries' acquisition of the Glidden paint operation of SCM Corporation will not detract from this diversity.

Glidden is third largest among the ten largest architectural paint producers, but the combined volume of these ten producers amounts to only about half of this year's \$4.2 billion volume of architectural paint.

Sherwin-Williams is by far the largest producer of architectural paints, with a volume of more than \$800 million at the manufacturers' level in the US this year.

Next largest are PPG, which has under half of its \$875 million coating volume in architectural and special coatings, and Glidden whose \$400 million volume is all architectural and special coatings.

Other big architectural paint makers in the \$300 million sales range are Valspar Corporation, which became big by acquiring Mobil Corporation's paint business; Benjamin Moore Corporation, and DeSoto Coatings, Inc., which sells a large volume of its paints through the Sears department stores.

Inmont, which ranks itself as second largest in original automotive coatings and third largest in refinishing, has added to its line the redish topcoats of the BASF affiliate that acquired the automotive coatings business of the Cook, Paint & Varnish Co. some years ago.

Inmont's strategy, a spokesman says, is to deliver a total package to its customers, including primers, phosphates, sealants and related products.

Inmont also is building satellite plants near its major automotive customers' assembly plants. Already in operation is a facility

serving two Chrysler plants in St. Louis, Mo. Another to serve the GM plant in Linden, N.J., will be finished in December, and a third, for the GM facility in Tarrytown, N.Y. Each of Inmont's new plants will provide not only "just-in-time" control of inventories of OEM coatings, but also continuous on-site quality checking, the spokesman says.

Inmont also has opened a 55,000-square-foot new applications research laboratory in Southfield, Mich., adjacent to an existing automotive R&D plant. J. Larry Jameson, Inmont's president, says the facility answers the auto industry's expressed need for more process development and product engineering—responsibilities previously assumed by the auto makers themselves.

DeSoto Chemicals' total sales in the first six months were \$228 million, up 3 percent from \$221 million last year, and earnings from operations edged up to \$7.3 million from \$7.2 million.

OTHER PAINT MAKERS

Industrial markets have been stronger than house paint business so far this year, but many of DeSoto's industrial products eventually go into consumer products. The latter include can coatings and siding coatings.

DeSoto has developed a coating for optical fibers to replace copper telephone wires. Conversions to the new fiber are under way in Japan through Nippon Telegraph & Telephone Company; in England, through a program managed by the National Post Office, and in other European countries through government-sponsored programs.

Conversion in the US has been slow, a DeSoto spokesman says. In fact, Corning Glass Works has laid off a significant number of employees because of a slowdown in US sales of optical fiber.

DeSoto's system is based on ultraviolet-cured coatings. This system has not only

grown with the market, but has largely replaced silicon, which was one of the original coatings for optical fibers, the DeSoto spokesman says.

In Buffalo, N.Y. Pratt & Lambert, Inc., a producer of paints, chemical coatings and adhesives, had sales of \$97.9 million in the first half, up from \$94.1 million a year ago, and net income was \$3,256,000, versus \$2,998,000 last year. Third-quarter net income is estimated at \$2.3 million.

"Sales to defense contractors, product finishers and packaging/paper converters have been sufficiently brisk to overcome weaknesses in corrosion control, footwear, farm equipment and general aviation markets," says R.D. Stevens, Jr. chairman, and J.J. Castiglia, president. House paint demand has been satisfactory, they add.

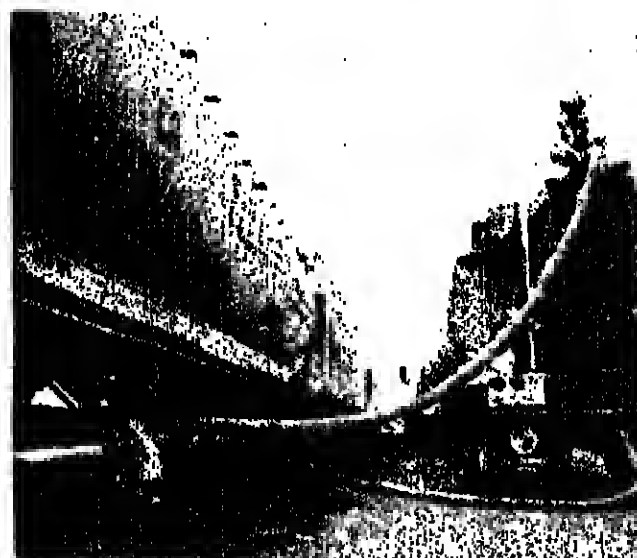
H.B. Fuller Company, diversified specialty chemicals company headquartered in Arden Hills, Minn., near Saint Paul, says its largest operating group—adhesives, sealants and coatings—continued to perform well during the third fiscal quarter ended August 31.

Anthony L. Andersen, president of Fuller, reported nine-month sales of \$399.6 million, up 14 percent from \$341.3 million a year ago, and net earnings from continuing operations of \$13,765,000, up 51 percent from \$9,109,000.

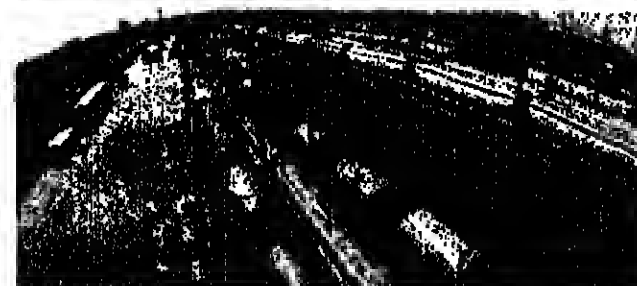
Inslco Corporation, a diversified company based in Meriden, Conn., had 1985 paint sales of \$230.6 million, up from \$214.8 million a year ago, and operating profits of \$17.9 million up from \$16.9 million.

In Grand Rapids, Mich., Guardsman Chemicals, Inc., diversified coatings products, recorded third-quarter earnings of 1,160,000, up from \$44,000 a year earlier, and sales of \$24,833,000, versus \$23,875,000.

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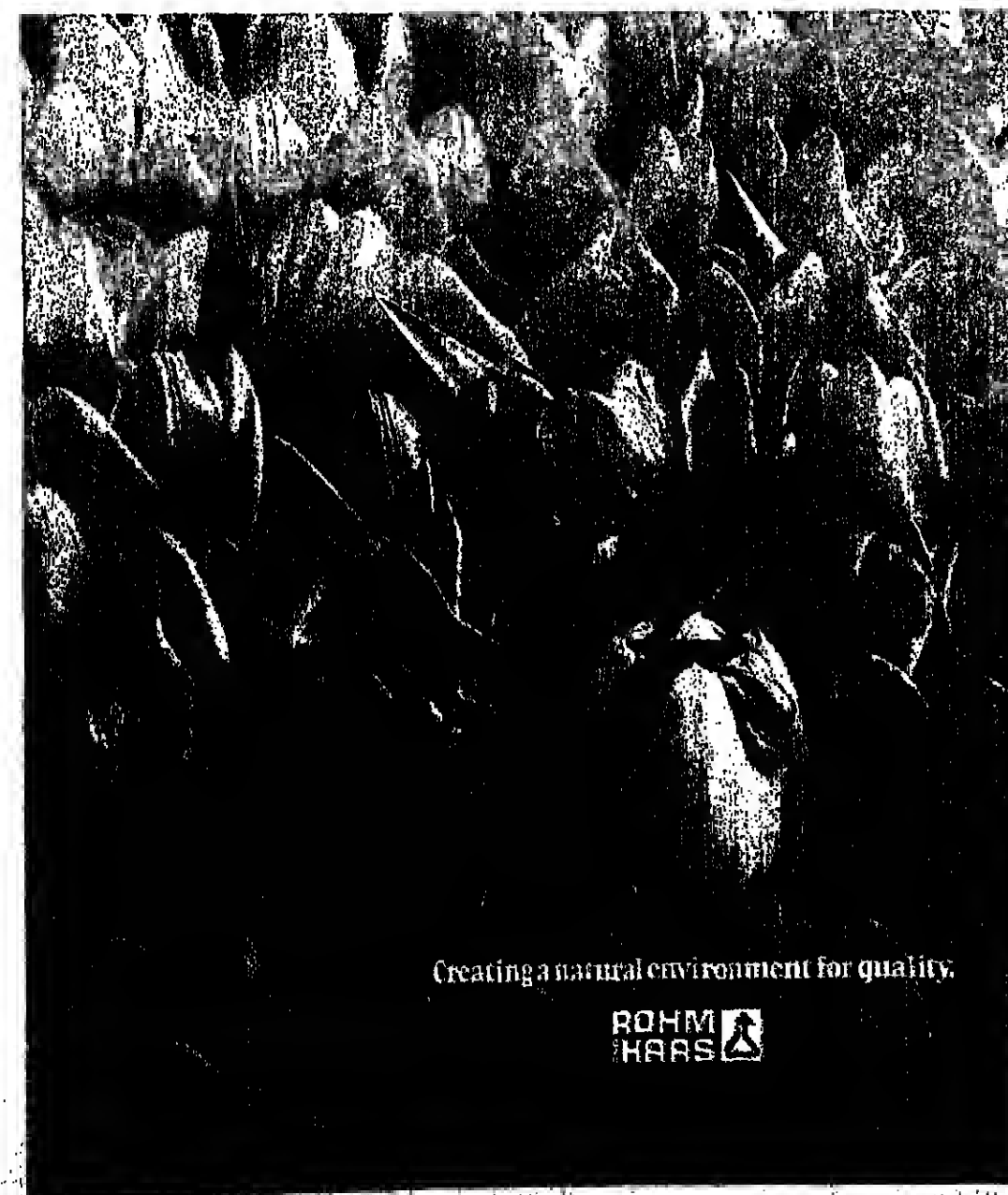
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Creating a natural environment for quality.



1

COATING MATERIALS '86

POWDER COATING

Powder Coatings Set For Stronger Growth

By PHILIP MANN

Powder coatings' share of the US industrial coatings market should more than double between now and the early 1990's, according to producers of the materials, who see annual growth rates of 12 to 15 percent over the next five years.

Powder coatings currently account for about 6 percent of the industrial coatings market, compared to around 3 percent at the beginning of the decade, and their market share is expected to reach 15 percent early in the next decade.

While powder coatings were invented in Europe some 30 years ago, they didn't begin to catch on in this country until the mid- to late-1970's.

The process works as follows: dry powder is pneumatically fed from a supply reservoir to a spray gun where a low amperage, high voltage charge is imported to the powder particles.

The powder used in the powder coating process is comprised of resins and pigments and in its dry, formulated state is then sprayed onto a part to be finished.

The parts to be coated are electrically grounded so that the charged particles projected at them are firmly attracted to the part's surfaces and held there until melted and fused into a smooth coating in the baking oven.

The coating process can be done manually,

or by an automatic process, where computer programmed robots can perform the spraying in booths, some more than 100 feet long.

Observers claim that the wide variety of equipment available makes powder coatings feasible for the small end-use manufacturer, as well as for the large user who may need an extensive finishing operation for multiple products.

Powder coatings fall into two broad categories — thermosetting and thermoplastic. The choice of which to use depends largely on the application. With both types, heat is applied and the powder melts, flows and forms a continuous film.

“Advances (in the architectural extrusion market) will be coming in the very near future.”

Thermosetting powder coatings are far more common than thermoplastic powder coatings. Sources estimate that more than 90 percent of powder coatings are thermosetting.

Generally, thermosetting powder coatings are used in decorative applications, or when comparatively thinner coatings are desirable.

Thermoplastic powder coatings, on the other hand, are more suitable for items re-

quiring a thick coating, where extreme performance requirements must be met.

The principal resins used in the thermosetting-type powder coatings are epoxy, polyester and acrylic. These are sometimes crossed by manufacturers possessing sophisticated equipment, to gain the best properties of each.

Thomas Topilek, manager of marketing development at Pratt & Lambert, notes that while no new resins are expected to be developed soon, the current resins will probably be improved. Thermoplastic-type coatings mainly use vinyl, nylon and fluoropolymer resins.

Consumption for decorative uses is higher than functional consumption, and its growth should be greater, producers agree. For example, Dow Chemical USA forecasts decorative consumption will rise to 93 million pounds by 1988, while functional uses should increase to 42 million pounds. Current consumption figures are about 58 million to 60 million pounds for decorative, and about 35 million pounds for functional uses.

According to the Powder Coatings Institute, Alexandria, Va., more than 2,000 manual and automatic powder coating operations exist today, roughly double the number just two years ago. These figures apply only to electrostatic coating operations.

The increase in operations is attributed largely to Environmental Protection Agency's crackdown on volatile solvent emissions.

A common problem among many finishing departments using liquid paint systems has been the increasingly high cost of meeting air and water regulations, as well as the disposal of hazardous and flammable wastes.

However, powder coatings contain no solvents and thereby emit negligible, if any, polluting volatile organic compounds.

Another advantage of powder coatings is that oversprayed powder is recycled, so hardly any solid waste is generated. PCI estimates powder's utilization rate at 95 to 97 percent.

INNOVATIONS IN POWDERS

Philip Barnett, regional sales manager for Nordson Corporation, thinks that advances in material utilization are among the major innovations in powder coating.

Mr. Barnett refers to the cartridge booth concept as being “the biggest” innovation of the last five years.

He says that a pleated paper cartridge, described as looking like a car's air filter but taller, separates powder particles from the booth's exhaust air, and traps them on the surface of its filter. Then, the particles become absorbed in an air current, which collects them for recycling to the powder gun. Mr. Barnett notes that separate cartridges are used for each color, so the particles are not mixed.

Yet another advantage (thought by some to be the most important) is the overall reduction in operating costs, compared to conventional solvents, waterborne and high solids coatings.

Operating costs actually used to hinder the powder coatings industry, because start-up costs are higher than for other coatings. So, even though overall costs were lower, some companies found the initial capital outlay too much to handle.

However, according to PCI and others, a combination of falling start-up costs for powder systems, along with increased costs for antipollution equipment, are helping to overcome this impediment.

The falling start-up costs are due to advances in technology, according to Gregory Bocchi, executive secretary of PCI. Two years ago, the initial capital outlay was about \$150,000 for two electrostatic powder spray booths, four electrostatic automatic guns, one manual electrostatic gun, two reciprocators, and two powder recovery systems with automatic recycle. Now, according to Mr. Bocchi, the cost is closer to \$125,000.

In comparison, the average start-up cost for a waterbased system is \$108,000, for two water wash booths, one dry filter booth, four automatic electrostatic guns, two manual



POWDER COATINGS: One of the fastest growing segments of the coating industry, powder coatings' market share could reach 15 percent in the 1990's. Powder is a preferred finish for such things as wheel rims, refrigerator casings and washer tops.

electrostatic guns, two reciprocators and safety interlocks and stand-offs.

The average start-up cost for a high-solids based system is \$110,000, for two water wash booths, one dry filter booth, four automatic electrostatic high speed atomizers, two manual electrostatic guns, and paint heating equipment.

Powder coating material costs remain higher than those for most other systems. The annual cost of coating 12 million square feet of space would be \$383,600 at a dry film thickness of 1.5 mils. Substituting gallons: pounds, conventional solid material would cost \$333,600, and high-solids material would cost \$345,600.

However, as Mr. Bocchi and several manufacturers point out, powder makes up these costs in total operating expense. Based on material, labor, cleanup, maintenance, energy, sludge disposal and depreciation costs, total annual operating costs by powder are \$481,000 (.0401 cents per square foot). This compares with a \$523,600 annual cost for conventional solvents (.0435 cents per square foot), \$537,200 for high solids (.0448 per square foot) and \$594,000 for waterborne coatings (.0495 cents per square foot).

“Powder coatings market share should more than double by the early 1990's.”

PCI also notes that powder's energy consumption is 30 to 50 percent lower than for other systems, its labor costs are 30 to 40 percent lower, and waste is cut by 80 percent. Additionally, rejects are reduced by a factor of four or more.

As costs have declined, and powder coatings have become more accepted, their use has grown. For example, powder has been used more often in the auto and truck market in many under-the-hood applications.

They are also being used to coat vehicle components. Industrial Powder Coatings, Inc., is applying a thermosetting epoxy powder coating to six-cylinder engine blocks.

According to Richard Fineran, the executive vice-president, IPC is coating about 5,000 engine blocks a day, with the potential for much more. Engines are coated to minimize rusting and improve appearance.

Charles Grubbs, development specialist at Mobay Chemical Corporation's coatings division, like other observers, thinks the automotive industry offers a big opportunity, and he calls this “a critical area.”

Powder also continues to make headway in appliance applications. For example, it is being used as a replacement for porcelain on washer tops and lids. Also, it is being used to replace the old enamel on the inside of the tub.

Continued on Page 40

COATING MATERIALS '86

COIL COATINGS

Coil Coatings Aiming For New Opportunities

By MICHAEL MCCOY

Expansion to an industry dedicated to coating the output of the struggling steel and aluminum industries is an uphill battle, but the coil coating business succeeded, until just last year, in logging impressive growth figures. New applications present the opportunity to continue the upward trend this year and beyond.

According to the National Coil Coaters Association, total shipments of pre-painted metal coil from US, Canadian and Mexican coil coaters were 3,988 million tons in 1985, down 5 percent from 1984's record-setting level. Coated steel dropped 8.1 percent, to 1,336 million tons, while coated aluminum almost 14 percent.

Almost all the 1985 loss in steel came from the industry's largest single market, coating steel with a weldable zinc-rich primer for corrosion resistance in auto body parts. NCCA reports that shipments in this segment dropped 10.7 percent in 1985, to 1.278 million tons.

Replacing the zinc-rich primer is a zinc electrolizing process developed in Japan. While 1986 losses in this area seem to be less severe, many coil coaters are writing off the segment and are instead looking to new applications developed in conjunction with paint and steel makers.

Most promising as a growth area appears to be the home appliance industry, a segment that currently accounts for slightly more than 3 percent of coil shipments.

“This is a very high interest area right now,” says Robert Currell, vice-president, marketing and product development, at Whitaker Corporation. Within the past few years, he says, appliance manufacturers such as General Electric Company and White Consolidated Industries, Inc. have converted a segment of their refrigerator and freezer production to incorporate pre-coated metal in cabinet framing.

Happy with the results, these and other appliance makers are said to be planning conversion of other appliance lines to coil-coated cabinets. This should occur by 1988 for home laundry equipment and by 1990 or 1991 for kitchen stoves, according to one paint maker.

For the time being, paint companies are working to develop systems that will meet the rigid specifications the appliance industry has already established for post-paint cabinets.

Paints must be flexible enough to be

formed into the shape of the cabinet without cracking, but tough enough to withstand an environment significantly harsher than the one refrigerators face. Stain, abrasion, detergent and corrosion resistance are all necessary, Mr. Currell says.

Converting to pre-painted metal is an advantage to the appliance maker for a number of reasons. It glues the list on environmental considerations.

Most coatings in this market are solvent-based, and as Federal regulations become more and more stringent, compliance can be difficult for an appliance maker or, for that matter, any company that is post-painting with a solvent-based paint.

For today's coil coater, however, that obstacle has already been surmounted. “This is the only thing we do,” says John Benson, vice-president of sales at Roll Coater Inc., “so it was a necessity that we come into compliance.”

EPA, he says, came down first on toll coaters like Roll Coater that are large solvent users. By now, Mr. Benson feels, most in the business of coil coating with solvent-based paints have mastered EPA's regulations.

EPA COMPLIANCE EASIER

Complying with EPA is usually easier for a coil coater than for a spray coater. Observers say that in a modern coil coating system, the time between application of the coating and entry into the baking oven is measured in seconds.

Consequently, up to 95 percent of the solvent system is still in the paint mixture when the coil enters the oven. There the solvent is easily collected and incinerated, often to be used as a source of heat for the building.

On the other hand, with a spray-applied coating, as much as 75 percent of the solvent has evaporated by the time the piece reaches the oven. Collection of this solvent from the general atmosphere is a more difficult and costly task than collection in the oven.

Mr. Benson believes any manufacturer using solvent-based coatings and planning to expand or modernize is going to seriously consider pre-coated metal.

Weighing the cost of compliance against the savings in plant size and insurance costs that come with pre-painted metal is what is turning more appliance manufacturers to coil coating, Mr. Benson feels.

Another coil coating market just in its infancy is “under the hood” automobile parts. According to John Williams, technical marketing manager for Mobay Corporation, air filter housings, valve covers, oil pans, engine

covers and fan blades are all potential candidates for coil coating.

Any coating used on such parts must be hard as well as resistant to oil and gas. More importantly, the coating must be able to accommodate up to several inches of stamping and drawing that is necessary to form the piece from sheet metal.

Dr. Williams says Mobay has been successful in making headway in this market with coatings that incorporate the company's blocked polyisocyanate technology.

Commercial penetration of the “under the hood” market is further down the road, since the conversion to a pre-coat system means significant investment for the auto maker in machinery such as stamping equipment.

Dr. Williams believes, though, that conversion would be “tremendously economical to the auto industry” and anticipates real coil coating growth in this area.

Another emerging field, according to Charles Todd, coil coating sales manager at Lilly Industrial Coatings, Inc., is the office furniture — desks, file cabinets, computer tables and the like — that is welded or mechanically fastened together and then electrostatically spray painted. This method, say coaters, can be inefficient and can also pose the familiar environmental problems.

Welding coil-coated steel is possible, but difficult, says Mr. Todd, owing to the problem of heat deformation of the paint. Such furniture can be produced, though, by forming coil-coated steel and bonding it with a structural adhesive.

Essex Specialty Products, Inc., a subsidiary of Essex Chemical Corporation, makes “Betamate,” a urethane-based structural adhesive that the company claims is suited for this purpose. Thomas Farrell, “Betamate” marketing manager, says that an evenly distributed “Betamate” bond is as

much as three times stronger than a spot weld.

Moreover, he says, a bonded piece of furniture is quieter than a welded one due to the adhesive's relative flexibility. Mr. Farrell says that office furniture made with “Betamate” structural adhesives is not yet on the market but expects an entry by early 1987.

One of the largest uses for coil-coated steel and aluminum is the building products business, accounting for one-quarter of coil shipments in 1985, according to NCCA. Coatings used in this area tend to be polyesters, linear polyesters, siliconized polyesters, and PVC resin-based products.

An area of interest and growth within this market is the fluoropolymer-based coatings, which make up about 5 percent of the total coil market.

PENNWALT RESIN USED

Called the “Cadillac” of the business by one marketer, these products are based on the “Kynar” 500 polyvinylidene fluoride resin produced and licensed by Pennwalt Corporation.

Four paint companies — PPG Industries, Whittaker, DeSoto and Gildred — make “Kynar”-based products. Howard Fowler, marketing development manager of PPG's coil coatings group, says that these coatings usually end up on high visibility buildings.

Most involved in the business say “Kynar”-based products have been growing above the paint industry average, buoyed by the commercial building growth of the last five years.

Another growth area for both fluoropolymers and siliconized polyester coatings is what Mr. Fowler calls standing seam roofing: ridged metal roofing that tends to be used on commercial buildings like shopping centers.

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COIL COATINGS MARKET: Coil coaters have been hard-pressed to meet projected growth figures in the face of declining markets for steel and aluminum, but observers feel new applications and the opportunity to continue the industry's upward trend this year and beyond.

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COATING MATERIALS '86 COATINGS '86

Solvent Standards

Continued from Page 30

and other experts acknowledge that several hurdles must be overcome before polyurethane top coats are in wide commercial use.

One major concern is the presence of highly toxic isocyanates in the spray gun. Dr. Mirgel says the spray booths on the assembly line must be sealed off from humans, a conversion process he calls a "major investment."

Mr. Mills and Mr. Plazzon both note that sophisticated metering systems are required to insure a proper blend of the polyol and polyisocyanate components, a requirement which Mr. Plazzon calls a "critical issue."

Because of these and other factors, most auto paint experts say that two-component polyurethane clear coats won't be in widespread use until the 1990's.

Another challenge facing auto makers and their paint suppliers is matching the paint finish of steel body panels with plastic body panels which are now painted off-line.

Currently available plastic body panels, particularly those made of reaction injection molded polyurethane, go through the curing process at significantly lower temperatures than do painted metal parts. As a result, plastic parts are currently assembled and painted separately from the major metal parts.

Bee Chemical, a unit of Morton Thiokol, says it has developed a coating system that can make a hybrid steel-plastic auto exterior topcoat appear uniform. Bee calls its product "Unicoat," a line of primers and topcoats, it says can allow hybrid cars to be primed and finished in one place.

Bee describes its topcoat finish as a "modified" thermosetting acrylic resin base coat/clear coat, and its primer is based on the same technology.

LOW VOC LEVEL

The paint system can be applied with conventional technology, and has very low volatile organic compound emission levels, the company says. The company also says its layers can be cured at 175 degrees Fahrenheit, allowing them to be used on RIM parts.

Bee has been working on the "Unicoat" system for the past seven years, but the product gained little attention until recently. According to Joseph E. Klein, vice-president of marketing at Bee, three factors sparked auto company interest in Bee's paint system.

First, the company was acquired by Morton Thiokol in early 1985, giving Bee more financial muscle for research and development work and marketing. Second, the "Unicoat" system recently was awarded a "Q1 Preferred Quality Award" from Ford for products shipped from Bee's Lansing, Ill., manufacturing plant.

In addition to providing higher visibility to "Unicoat," the Ford award stipulates that the auto makers will "give preference to (Lansing) for participation in new part development programs and in source selection."

Mr. Klein also notes that a commitment by Bee to build a multi-million dollar "assembly line type paint line" in Belleville, Mich., will enable auto makers to test and evaluate the "Unicoat" system on a large scale.

Mr. Klein says the "Unicoat" system has already generated "tens of millions of dollars" in sales to the major auto makers and their suppliers, but to date, "nobody's painting the full car with 'Unicoat'."

At present, the system is only being used on plastic parts, Mr. Klein says, and in metal parts located in high abrasion, high impact areas of the car he calls the "stone zone."

He predicts that "Unicoat" will "get its first colors awarded for the 1988 model year," although he concedes that "it's a major step for a car maker to paint (hybrid models) universally. It takes a lot of risk for a car company to be the first."

Mr. Mills at Ford says high-solids clear coats "don't have the flexibility strength to be used on plastics." He says that at this

point, "RIM can't use the same clear coat as metal."

Mr. Piszczon of GM says having "universal clear coats is extremely important," but that using them "creates another problem."

He notes that RIM parts have been painted off line for years. To rearrange the assembly line to install RIM parts prior to painting would create "job spacing" problems, and assembly lines would have "to be redesigned" to incorporate RIM products.

He says this problem applies specifically to RIM products that must be processed at low temperatures. He says no problem exists with sheet molding compound and composite plastics, because available clear coat systems work well.

"The concept is a good one," Mr. Plazzon says, and "there is a need for products of that type." However, "the ultimate use of (universal clear coats) is somewhat limited by restrictions in the facility."

EPA Takes

Continued from Page 32

notes, and recent studies have revealed that up to 48 metric tons of the per year are loaded into the Maryland portion from small and large water craft.

But Arthur Sheldon, director of safety and environmental affairs for M&T Chemicals Inc., the major manufacturer of organotin chemicals in the world, says laboratory tests cannot be compared to actual conditions of ecological systems.

"Laboratory experiments, while of value in determining the range of toxicity for a chemical, do not address the question of the potential effect in a true ecosystem which in nature presents many complex interactions," Mr. Sheldon says.

Because laboratory studies and models tend to vastly simplify the environment in order to make estimates, he says it is extremely difficult to use laboratory data to predict the effect of TBT on inland waters. Field studies are needed to make that determination, according to Mr. Sheldon.

He also maintains that although organotin chemicals are classified as heavy metals, they do not accumulate or persist in the human body or in the environment. In humans, Mr. Sheldon says they quickly metabolize to less toxic forms, and the same pattern of degradation occurs in the environment.

Thomas J. Gibbons, director of marketing for International Paint Company, says it is important that regulatory actions taken by the government be based on hard scientific fact because a ban on TBT paints would have severe economic impacts.

"A ban on all tin-bearing paints in US waters would create economic havoc, as well as great enforcement problems, since some 70 percent of all ocean-going vessels are coated with these products," says Mr. Gibbons.

He also contends that a ban of all application of TBT-containing paints within the US or to US flag vessels would cause significant damage to these sectors compared to foreign competition.

Instead, Mr. Gibbons suggests that regulatory considerations focus on acceptable release rates, and points out that TBTs are released more quickly from fresh associated paint than from copolymer paints.

Copolymerers compose 20 percent of the market and free associated paints, 10 percent, he says. By banning free associated tin-bearing paints, Mr. Gibbons says, 85 percent of the TBT releases would be eliminated.

He says a restriction of free association products would not have a great impact on the US Merchant Marine fleet or on shipyards, but would adversely impact some sectors of the recreational boating industry.

In freely associated antifouling paints, TBT is physically incorporated into the paint matrix. The TBT is slowly released through

diffusion as surface paint particles dissolve. This type of paint is characterized by a high initial release rate and a short time period of protection.

TBT in copolymer paints is chemically bonded to the paint polymer and is released through a bond breaking process of hydrolysis. New TBT molecules are exposed and released by the gradual erosion of the paint as the vessel moves through the water.

EPA estimates that approximately one-third of the 800,000 pounds of TBT produced annually is used in antifouling paints, one-third in wood preservatives, and one-third in other pesticides.

Solvent Makers

Continued from Page 34

mutations have been and will continue to be auto primers, can coatings and pre-finished wood and flatboard, according to Mr. Lee. "These have traditionally been areas for conventional solvents, but now waterborne has taken them over," he says. He goes on to point out that waterborne base coat in automobile base coat/clear coat systems is an emerging technology which may or may not find widespread acceptance.

One solvent traditionally used in waterborne coats which may not be sharing in that growth is ethylene glycol monobutyl ether (EB). Although free of VOC concerns, EB's close chemical relationship to EE and EM has focused attention on its toxic effects, leading one industry source to say that EB is suffering from "guilt by association."

EB, an effective coupling agent, plays an important role in waterborne coatings. According to one producer, it accounts for 80 percent of glycol ether solvent demand in waterborne coatings; use of EB has been expanding steadily over recent years. Nevertheless, toxicity concerns are leading many coatings producers to reformulate away from it.

Several solvents are competing to replace the popular EB, which saw total 1984 production of 270 million pounds in the US, according to International Trade Commission figures.

EB accounted for over 30 percent of the total 1983 consumption of glycol ethers and their esters in the coatings industry, or more than 75 million pounds.

As it is with other suspect solvents, PM is being used as a replacement here, as is isopropylene monomethyl ether. Another solvent that is growing at the expense of EB is propylene glycol tertiary butyl ether (PTB), which was designed with substituting for EB in mind. Other competing propylene glycol-based products are isopropyl ether, monobutyl ether, and n-butyl ether.

The problem with some of these solvents, though very effective, is that they are more costly than EB — as much as four times more expensive in some cases.

Besides spurring growth of oxygenated solvents, the upcoming deadline for nationwide VOC compliance has also led to increased use of some chlorinated solvents.

Among these is 1,1,1 trichloroethane, which is the most predominant metal cleaning solvent currently used in the US, according to Dow's Robert Simmons, an industrial marketing manager for that company's chemicals and metals department.

Another chlorinated solvent, methylene chloride, has come under scrutiny from both industry and government due to toxicity concerns. Although predominantly used as a paint stripper, methylene chloride has drawn some positive attention in recent years as a solvent in coatings formulations, due to the low level of VOC concerns associated with it.

It is considered an excellent solvent, and very difficult to replace. Substitutes under consideration include acetone and methyl ethyl ketone, but their high flammability is a serious drawback.

Perhaps more likely as a candidate for replacement in combination with other solvents is n-methyl pyrrolidone, which is also finding greater use in waterborne coatings.

Use of conventional solids coatings by 1993

will be less than one-third of what it was in 1973, according to a spokesman for a major chemical company.

In 1973, he says, conventional solids represented 79 percent of the OEM coatings market, waterbornes 12 percent, high solids 1 percent, and other technologies 8 percent.

By 1993, conventional solids will represent just 24 percent, waterborne 36 percent, high solids 31 percent, and 9 percent for the others, such as powder and radiation-cured coatings systems.

Latex Systems

Continued from Page 33

settings, acrylic is said to be the premier resin. "In terms of durability, ultraviolet light stability, color permanence, flexibility and surface adhesion," acrylics are preferred, says an analyst at Charles H. Kline & Co.

Less expensive vinyl resins take a large share of the interior market, but have difficulty matching the performance of acrylic systems in exterior use. At Sherwin-Williams, "with house paints, we use mostly acrylic. Due to cost considerations, we have been working on vinyl, but it absolutely fails to meet the performance requirements" before it is used.

An Air Products spokesman says there is a trend in the industry involving staking out a position somewhere between acrylic and vinyl resins. Vinyl resins are a low margin, commodity business, he says, and "more companies are trying to move into the middle ground with specialty materials" to earn a higher return.

"The trend is to try to get away with some specialty terpolymer replacing pure acrylic for exterior and interior semi-gloss," he says. Union Carbide Corporation has a line of acrylic terpolymers that have cut into Rohm and Haas' hold on the acrylic market, he notes.

Unocal Corporation says that it is increasing its sales of styrene-acrylic resins in architectural coatings. "There is no reason why a pure acrylic is required," says Mike Brennan, manager of polymer market development.

A spokesman at Interz Inc., formerly Celanese Specialty Resins, says his company is placing its emphasis on two areas of higher performing waterborne resins. These are a two-package waterborne epoxy and a multi-type curing agent and a two-package waterborne epoxy and acrylic-type curing agent.

Powder Coatings

Continued from Page 38

dryer drum and spinner basket markets at the end of 1985, according to industry figures, applications had the largest share of powder coatings consumption, at 18 percent.

Next was coating of metal furniture (11 percent), followed by electrical coatings (12 percent).

Transportation uses, at 11 percent, about grew because of under-the-hood uses. Machinery and equipment also have about 11 percent of the consumption share.

Mobay's Grubbs notes that the architectural extrusion market has been big in Europe for years. "It'll happen in the US, advances will be coming in the very near future," he says.

Equipment manufacturers are working in ways to make powder coatings more usable with heat-sensitive items, including most plastics. Pratt & Lambert's Topcoat believes that a lot has already been done in the area, and notes that low-temperature powder has been developed.

These powders, he says, give the end user a choice of using high-temperature powder for less time than normal, or using low-temperature powder for a longer time.

Another breakthrough may revolutionize the powder coatings industry, according to Volatic, Inc. Called the "Color Select" is designed to lessen the time needed to change a color change in application equipment.

COATINGS & PLASTICS

ABS Rebounds

Continued from Page 5

low when raw material costs fell earlier this year. There was a lag time of two months before prices for the plastic were adjusted, he adds, and any pass-alongs of higher monomer costs will take a similar amount of time to implement, if they occur at all this year.

The lower US dollar value, which has caused import levels to fall in many chemical markets this year, has had no effect on the ABS market; this year, imports should be significantly higher than last year's 62 million pounds.

This August, Bureau of Census figures show imports totalling almost 50 million pounds. Continuing at this rate, they are sure to surpass 1984's record of 72 million pounds.

At least one producer feels that import levels are now beginning to stabilize, and should begin to fall over the last quarter this year. As he explains, published figures are frequently misleading, since all of what comes into the US is not necessarily sold. Another producer agrees that import levels will fall over the next few years as US resin makers focus on value-added services and specialty products which cannot be made abroad.

Nevertheless, producers concur that imports should capture between 6 and 8 percent of the total US market this year. Working inland from the East and West Coasts, imports continue to affect domestic pricing. Large customers know this cheaper material is out there, and are using this to pressure US manufacturers to bring down prices. The effect of imports is most pronounced in low-end commodity markets, since most of the material produced abroad does not qualify for use in higher end markets.

FINISHED ABS GOODS

Less obvious than imports of plastic pellets, but still a pervasive market presence are imports of finished ABS goods, which began to surface in the US about 5 years ago, reaching a peak in 1984 and 1985.

Currently, Mexico and the Far East are said to lead in exports of finished machinery and automobile parts containing the plastic.

Telephone manufacturing, a small but once profitable outlet for US manufacturers, has moved entirely offshore, producers report. Without finished good imports, domestic growth for the resin would be 1 to 2 percent higher per year, one producer explains.

Good news for ABS producers in the US this year is that both home appliance and business machine markets are strong. The Association of Home Appliance Manufacturers reports that domestic factory shipments of refrigerators and other home appliances totalled 33.7 million through September, up 6.4 percent over the previous year.

Similarly, the Computers and Business Equipment Manufacturers Association sees revenues from computer sales rising 20 percent this year over last year and business machine sales improving by 3.4 percent. Demand is clearly moving up, they say, after an extremely poor showing last year.

Reflecting the health of these two markets, ABS producers see home appliance demand for ABS tracking GNP this year, while business machine and computer housing demand should rise by between 5 and 8 percent. Next year, producers expect growth in the computer and business machine segment to

THERMOPLASTICS

BULK PRICES IN OCT. 1986

	OCT. (US \$)	SEPT. (US \$)
Polyethylene-LD, liner.....lb.	28-30	25-27
Polyethylene-HD, injection.....lb.	27-30	24-28
Polyethylene-LD.....lb.	28-32	28-30
Polypropylene, molding.....lb.	33-37	33-38
Polyethylene, g.p.....lb.	24-27	25-27
Polyvinyl chloride, pipe.....lb.	28-30	28-29
Butene-1 comonomer.....lb.		

reach 10 percent. Last year, demand for ABS fell 5 percent overall, based on lower demand in this segment.

The automotive market, which accounts for roughly 20 percent of the total ABS market, has been weak this year. The Motor Vehicle Manufacturing Association reports that by the end of the third quarter this year, domestic passenger car sales fell 2.2 percent while imports rose 15 percent. In August, inventories rose 12 percent. Despite higher sales, September's inventories were still 5 percent higher than they had been the previous year. Most producers, gauging their response to fairly low domestic output this year

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

None

CHANGES/DOWN

None

COATINGS INDEX

The Coatings & Plastics Index reflects the prices of 13 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1986	306.4
Oct. 24, 1986	306.4
Oct. 3, 1986	308.4
Nov. 1, 1985	308.4

Chemical Prices Start on Page 48

and higher inventories, expect minimal increases at best in this segment of the market.

Although some expect recent sales incentive to have some short term effect on demand, ABS producers are not expecting any miracles.

Both Borg-Warner and Monsanto have expanded ABS capacity through debottlenecking this year. Dow Chemical Company plans to have a new capacity in Hanging Rock, Ohio on line by the first quarter of 1987.

Since September, capacity utilization has stood at 80 percent of nameplate. With the new expansions, many fear that this figure will drop to the low 70's, with obvious effects on pricing.

Although the resin has lost some ground to cheaper plastics in the commodity areas, particularly pipe, ABS is said to be capturing market share from some of the more expensive engineering polymers.

ABS-nylon alloys, such as Monsanto's "Triax" and Borg-Warner's "Eliemid," both introduced this year, currently show great potential in industrial and automotive applications. Other pockets of high growth for ABS include medical instrumentation housings.

Although healthy, the US market has certainly matured since the days of double digit growth in the '80's. Despite a worldwide over-capacity problem in the commodity resin area, producers see growth opportunities for higher-grades resin developing in Southeast Asia, Peoples Republic of China, Eastern Europe, and Latin America, small bases which are showing annual growth rates of from 8 to 12 percent per year and which could boost export figures significantly by 1990.

Meanwhile on the domestic front, producers continue to trade higher operating rates for better prices in an attempt to keep up with this competitive market.

PLASTICS MATERIALS

LIQUID CRYSTAL POLYMER — Dartco Manufacturing Inc. plans to reduce prices for its full line of "Xydar" injection moldable liquid crystal polymers, in an attempt to expand market share for the product.

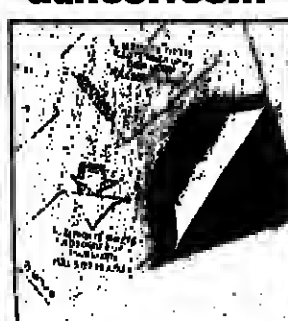
The company has lowered prices for its "FC series" of glass and mineral-filled high per-

Continued on Page 44

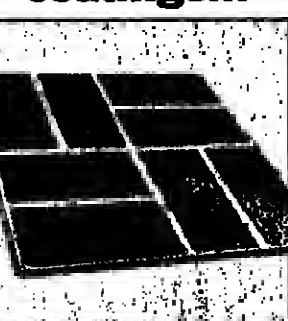
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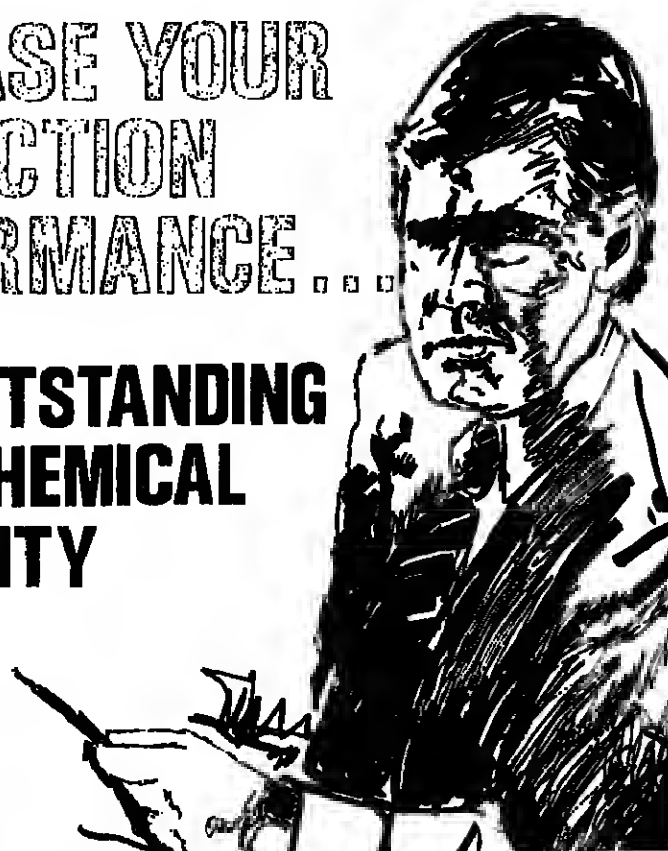
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HEAVY & AG CHEMICALS

NPK Consumption

Continued from Page 3

cause the \$2 per bushel payment should free up additional cash for fertilizer purchasing.

US nitrogen producers will be hit especially hard by the drop in nitrogen consumption. Many industry observers feel this year's record nitrogen import levels will continue through 1986-1987, leaving US nitrogen producers to bear the brunt of the consumption decline.

For instance, Mr. Baumes calculates that 4.1 million short tons of nitrogen were imported in the 1985-1986 fertilizer year. With new capacity coming on in Trinidad and Canada in 1987 he says imports could increase even more.

Fertilizer movement has been slow this Fall, and like last fertilizer year, producers are looking toward heavy Spring movement. Sources quote bargeload quantities of ammonia at \$70 to \$75 per ton in the Gulf, noting though, that large sales are uncommon.

Phosphate producers can afford to downplay the PLD announcement because they are concentrating on the export market. Mr. Nyiri believes the export strengthening will continue, and estimates calendar year 1987 exports will be up 500,000 to 600,000 tons, P₂O₅ basis, over this year's levels.

PHOSPHATE EXPORTS UNCHANGED
As it is, Mr. Nyiri says August, September and October each saw about 500,000 tons in P₂O₅ export sales, for a 3-month total almost the same as the total for first 7 months of the year.

Also expected to help exports in the months ahead is the late-August cancellation of an EEC quota on US ammoniated phosphates. The quota was instituted in retaliation for US limits on finished steel imports from the EEC.

Pakistan, India and Latin America are said to be dominating export trade. China is still expected back in the market, although its purchase power may be hindered by a lack of hard currency. Barter agreements are expected to be prominent in months ahead.

Meanwhile, US Gulf bargeload movement of phosphates is said to be very slow at present. One product puts DAP prices out of river terminals in the Midwest in the \$150-per-ton-range.

BASES & SALTS

ALUMINUM SULFATE—Tennessee Chemical Company is announcing an \$8 per ton off-list price increase on liquid alum. The increase goes into effect as contracts permit and applies to all four of the companies producing locations: Augusta, Ga., Cotawh, S.C., Cedar Springs, Ga., and Springfield, Tenn.

The increase follows a similar announcement by Stauffer Chemical, General Chemical and General Alum & Chemical.

SODIUM BICARBONATE—Two producers of sodium bicarbonate have announced price increases of 50c. per hundredweight.

Stauffer Chemical Company's hike is effective November 15 or as contracts permit. The new pricing, per hundredweight, f.o.b. Chicago Heights, Ill., freight equalized with nearest competitive producing point, is as follows: powdered USP/FCC, \$18.55 in bulk, \$17.55 in 50 and 100 pound bags and in Super

Sacs: powdered technical, \$16.40 in bulk, \$17.40 in the three bag sizes; fine granular USP/FCC, \$17.10 in bulk, \$18.10 in the three bag sizes; extra fine powdered USP/FCC, \$16.70 in bulk, \$17.70 in 100 pound bags and Super Sacs: coarse granular USP/FCC, \$17.55 in bulk, \$18.55 in 100 pound bags and

PRICES TRENDLINES

WEEK ENDING OCT. 31, 1986

CHANGES/UP

None

CHANGES/DOWN

None

HEAVY & AG INDEX

The Heavy & Ag Chemicals index reflects the prices of 18 representative materials in this sector and the quantity of each produced in 1985.

Oct. 31, 1986	113.88
Oct. 24, 1986	113.88
Oct. 3, 1986	113.88
Nov. 1, 1985	113.88

Chemical Prices Start on Page 46

Super Sacs: treated free flowing FCC, available in bulk, \$17.90 in the three bag sizes; industrial, \$16.25 in bulk, \$17.25 in three bag sizes.

Riverside Products Corporation is also increasing bicarb pricing: its increase is effective December 1. New pricing per hundred weight is as follows: USP powdered no. 1, \$17.55; no. 1 treated free flowing, 175 USP fine granular no. 2, \$18.10; no. 3 fine powdered, \$17.70; USP granular no. 4, \$17.70 (ISI) coarse granular no. 5, \$18.55; industrial, \$17.35. All prices are f.o.b. Cartersville, Ga. freight equalized, in 50 and 100 pound bags and one ton sacks.

Both producers cite increased operating costs as being behind the increase. Dwight, the largest sodium bicarbonate producer, announced a similar increase in October (CMR, 10/6/86, p. 33).

VANADIUM CHEMICALS—Strategic Minerals Corporation (Strateco) is increasing its price for two vanadium chemicals, effective November 1.

Vanadium oxytrichloride is moving to \$5.25 per pound from \$4.75 per pound. Vanadium tetrachloride in 3,000 pound cylinders is increasing to \$8.20 per pound from \$8.00 per pound.

Both prices are f.o.b. Niagara Falls, N.Y. Strateco was created on July 1 as the result of the leveraged buyout of Union Carbide vanadium and tungsten assets.

Footo Minerals and Stauffer Chemical, the two other US producers of vanadium oxytrichloride, have already announced similar price increases. They cited increased price of vanadium metal.

METALS & MINERALS

ZINC—Falconbridge Limited has raised its price for "Kidd Creek" Broad high-grade and special high-grade zinc, effective November 1.

Product shipped to the US will be at a price of 50c. per pound (US dollar) or 47c. per pound, and product sent to Canada will cost 69 1/2c. per pound, up from 85c. per pound.

Prices for prime Western grade and continuous line zinc with controlled lead added, shipped to the US, will be 50 1/2c. per pound (US dollar). Shipments to Canada will be 70c. per pound (Canadian dollar).

Finally, continuous line zinc with minimum added will cost 50 1/2c. per pound for shipments to the US (US dollar) and 70c. per pound for shipments to Canada (Canadian dollar).

Repligen Wins Grant From NIH For AIDS Tests

Repligen Corporation, Cambridge, Mass., has been awarded a \$1.9 million contract for the production of recombinant proteins for research on a vaccine against Acquired Immune Deficiency Syndrome (AIDS).

The 27 month contract was granted by the National Institutes of Health (NIH). Under the contract, which will be administered by NIH's National Institute of Allergy & Infectious Diseases (NIAID), Repligen will supply recombinant proteins and protein fragments to researchers at NIH and their collaborators.

In commenting on the award, Repligen's president and chief executive officer, Sanford D. Smith, said, "With this contract, the NIH has recognized our accomplishments in various areas of AIDS research. Foremost is our ability to produce highly pure recombinant antigenic fragments in large quantities." According to John McGowan of NIAID, this contract makes Repligen the major supplier for government experiments on AIDS vaccines.

Repligen has also submitted the antigenic fragments to the National Cancer Institute (NCI) as part of ongoing collaborative vaccine research being conducted by Repligen, Cytosine Inc. (Malvern, Pa.), and NCI's Dr. Robert Gallo, discoverer of the AIDS virus. These fragments are now being evaluated as possible AIDS vaccine ingredients.

In addition, Repligen supplies other recombinant antigenic fragments to Centocor for use in the first "second-generation" AIDS diagnostic test kit. The kit does not contain inactivated AIDS virus, as do the first-generation kits, and is presently being considered for approval by the US Food & Drug Administration.

"There are an estimated 1 million people in the United States alone who are infected with the virus that causes AIDS, and that number continues to grow. We hope that our ongoing research—including that conducted under the contract—will lead to the development of a useful AIDS vaccine," Mr. Smith added.

Repligen Corporation develops and produces biochemical and biocatalytic products for the health care, personal care, and industrial markets.

Drug Bill Pressed

Continued from Page 7

In the leadership in biotechnology, there should be no hesitancy on our part to engage in self-help," he added.

However, Justice Department officials are advising the White House budget office are advising the President to reject the package because of the vaccine provision, which would create a no-fault Federal compensation system for injuries caused by childhood vaccinations required to enter school.

Assistant Attorney General John Hultan said the administration is concerned the bill would create a major new compensation program for which "no legitimate national need has been demonstrated," would lead to a sharp increase in the role of the Federal judiciary, which would decide injury claims; and it seeks to establish a new ex-ante tax.

Fifty to 75 children each year out of millions vaccinated suffer permanent neurological damage as a result of vaccines, primarily from the pertussis component aimed at whooping cough, according to the American Academy of Pediatrics.

The potential for lawsuits has caused the price of the DPT vaccine to rise from \$4 to \$11.40 per dose in the last year alone. Insurers are reluctant to underwrite the liability and when they do, the rates are high. Consequently, 12 of the 15 US vaccine manufacturers have dropped out of the market.

Under the no-fault system envisioned by the bill, without proving that a drug firm was negligent, a family could be compensated for medical expenses, rehabilitation expenses, \$50,000 for death, and up to \$250,000 for death.

The provisions would also make changes in tort law to reduce the unpredictability of

legal damages against drug companies and protect them if they follow the Federal standards and requirements.

The program would provide only one of Congress approves an excise tax of 10 cents to \$1.50 on vaccine doses through separate legislation next year.

Gallium Arsenide For Sale by Alcan

Alcan Aluminum Corporation has decided to sell Tryston Technologies, Inc. of Phoenix, Ariz., a manufacturer of gallium arsenide substrates.

Alcan helped to establish the firm in 1984 and has operated it as a wholly owned subsidiary. The decision does not affect Alcan's other investments in the electronics market which includes purified gallium metal and gallium arsenide epitaxial wafer businesses.

"Despite its increasing sales, Tryston does not meet Alcan's goals at this time for developing business in the electronics market," Timothy C. Taff, president of Alcan Aluminum Corporation, stated. "However, we remain firmly committed to the gallium business."

The company is expanding Epitronics, its epitaxial wafer enterprise to Phoenix, Mr. Taff says. The expansion includes the purchase of MTCVII reactors, enhancement of existing characterization capabilities, and an increase in office and production facilities.

Alcan Electronic Materials, the company's gallium business, has also doubled its purification capacity, Mr. Taff says. Alcan Aluminum Corporation is a wholly owned US subsidiary of Alcan Aluminum Limited of Montreal.

Gas-Methanol Gets

Continued from Page 3

be about the same as those from gasoline currently used.

The decision was prompted by a petition filed by the Oxygenated Fuels Association asking EPA to remove the conditions. EPA granted the group's petition in April.

"OFA is delighted with EPA's decision," says George Dominguez, executive director of the trade group. "The removal of EI and the other modifications in what has become known as the Du Pont waiver should permit widespread use of the environmentally important alcohol fuel blend."

Mr. Dominguez also points out that the use of Du Pont waiver blend fuels "will permit significant reduction in carbon monoxide and other atmospheric pollutants."

Harry Buchanan, vice-president of Celanese Corporation and OFA chairman, notes that several states, including California, New York, Colorado and Arizona are already exploring the possibilities of using alcohol blends as part of their overall environmental improvement strategy.

"The EPA decision on the Du Pont waiver, by removing the EI restriction, will now enable the states and the nation to benefit from this new fuel," says Mr. Buchanan.

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November 8, 1986 CHEMICAL MARKETING REPORTER

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GENERAL ELECTRIC

COATINGS & PLASTICS

Continued from Page 41

formance compounds from \$12 to \$16 per pound to \$7.85 to \$9.55 per pound.

It has also introduced the first reinforced grade of "Xydar" resin, RC-210. This new grade is said to show superior strength, inherent flame-retardance, and high temperature and chemical resistance.

Dartco spokesmen say that it will provide manufacturers with an alternative, not only to metals and ceramics, but also to expensive specialty plastics, such as polyphenylene sulfide and polyetherimide.

Dartco claims to be the first commercial supplier of injection moldable liquid crystal polymers; the firm's production facilities in Georgia and New Jersey account for a total capacity of 22 million pounds per year.

PLASTICS MATERIALS

PHENOLIC RESINS — Information was missing from last week's article on phenolic resins: Reichhold Chemical Company did not announce a price increase. BTL Specialty Resins Inc., formerly the Specialty Phenolics division of Reichhold Chemical Company, announced an increase last month, before both phenol and phenolic resin increases were rescinded.

POLYETHYLENE — Himont USA Inc. will raise selling prices for its lines of "UHMW" (ultra-high molecular weight) and "VHMW" (very high molecular weight) polyethylene by 5c. per pound effective December 1, the firm announced last week.

List prices for the polymers increased by the same amount on April 1. The list price for UHMW is now \$1.00 per pound.

The polymers are used in corrosion and abrasion-resistant applications requiring high strength and durability, such as truck bed liners, gear components and chemical resistant pipes.

POLYSTYRENE — Huntsman Chemical Corporation will be implementing a second polystyrene resin price increase on December 1, the company announced last week, raising selling prices for crystal and impact grades of the resin by 3c. per pound, and those for ignition-retardant and pre-colored specialty grades by 2c. per pound.

The first round of polystyrene price increases, adopted throughout the industry, went into effect on October 1, boosting resin prices by 3c. per pound; higher styrene monomer costs were said to have catalyzed this primarily demand-driven increase.

When additional monomer increases were announced for November, American Petrofina Inc., a subsidiary of Oil & Chemical Company, reacted by announcing a second 3c. per-pound price hike for the polymer, effective November 1.

So far, Huntsman is the only other polystyrene producer to have picked up on this, although all makers of the resin describe both price increases as more than justified by strong demand and almost full capacity utilization, after years of depressed pricing and profitability.

PVC COMPOUNDS — Prices for BP Performance Polymers Inc.'s line of "Blanc" PVC compounds will go up 2.5c. per pound on November 15th, the company announced last week.

The new prices are said to reflect higher resin, plasticizer and lead stabilizer costs.

STYRENE-BUTADIENE LATEX — Responding to higher styrene monomer costs, the Emulsion Polymers Division of Reichhold Chemicals Inc. plans to increase prices for its "Tylac" styrene-butadiene paper coating latexes by 2c. per pound by November 1.

EPA Awards \$9MM Contract

ICF Incorporated, a Washington, D.C.-based consulting firm, says it has won the first major contract awarded by Environmental Protection Agency's newly created Office of Underground Storage Tanks (OUST). The contract — under which ICF will help this new office develop approaches for reducing the health and environmental risks posed by leaking underground tanks — allows OUST to request more than \$9 million worth of work as needed over the next three years.

"Of the more than one million under-

ground tanks used to store chemicals and petroleum products in communities across the United States, many are leaking and creating serious health and environmental risks," said James O. Edwards, ICF's chief executive officer. "ICF's task is to provide economic and analytical support to this new office as it develops, analyzes, and implements different approaches to control these risks."

High-Solids More Effective Than Low Solids

High-solids urethane maintenance coatings can reduce application cost up to 3.4 cents a square foot and give better results than their low-solids counterparts, according to a recently released Du Pont Company laboratory and field study.

"Given our findings, new and pending state legislation mandating the use of high-solids coatings to reduce emissions may prove a boon to maintenance paint users," says Walter Kaminski, Du Pont's technical program manager in charge of the study.

"Although high-solids urethanes command up to a 30 percent unit price premium for the paint itself, they are highly cost effective when labor is considered. Our tests showed these coatings took 25 to 35 percent less time to cover test areas."

"The high-solids coating also showed significantly better performance than conventional paints. For instance, it gave better hiding because of high film build, better edge protection because of lower shrinkage, and better appearance due to higher gloss."

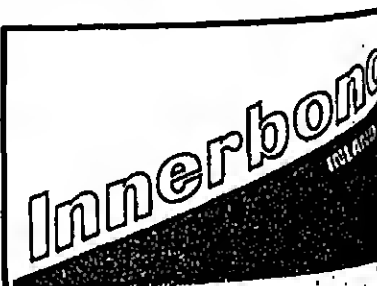
VERTICAL PERFORMANCE

The test found that painters can roll 5- to 6-mil-thick applications (wet) of both high and low solids coatings on a horizontal surface. However, on a vertical surface, high solids still rolled 5 to 6 mils wet, whereas low-solids gave only 4 mils wet.

The study compared the combined material and labor cost of high and low solids urethanes using roller, airless spray and conventional spray methods. The results: application by roller had a cost advantage of 11 cents; airless spray had an advantage of 11 cents; and conventional spray cost the same for both coating types.

The study, which used "Imron" 333, a high-solids polyurethane maintenance coating, was conducted at Du Pont's Materials Laboratory in Philadelphia and at refineries and chemical plants in Houston and Greentown, N.J.

"Given these findings, why haven't maintenance paint users adopted high-solids technology? The answer is that without productivity tests, users cannot see past the 'sticker shock' associated with a \$75 gallon of paint," says Kaminski.



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Hercules Inc. Restructures Its Polypropylene Film Operation

A major restructuring of the polypropylene film business of Hercules Incorporated, Wilmington, Del., designed to focus services and marketing efforts on the needs of user industries rather than on the products it offers has been announced by James E. Knox, president of Hercules Engineered & Fabricated Products Company.

The Film Group reorganization involves the formation of separate business units for the tobacco and snack food industries, for diversified industries which include bakery, candy and industrial markets, and for the converter industry which serves end-users in both snack and diversified fields. Each unit reports to David B. Collins, vice president-film.

"A primary purpose of the reorganization is to give companies in important film-using

industries their own Hercules teams who are familiar with their needs and committed to their interests," explained Mr. Collins. "These responsibilities were previously spread among different groups when we were structured along product-directed lines."

Each of the new business units will have its own sales staff and responsibilities for product development and technical service for the industries it serves. From an internal standpoint, Mr. Collins said, they become separate profit centers and market-driven businesses.

Heading the new business units are: Richard L. Johnson, director, tobacco industry; William B. Wagamon, director, snack food industry; Joel J. Rolsman, manager, diversified industries; and Ralph H. Dale and Howard H. Taylor, managers, converter industry.

Business manager for the Film Group is Richard H. Hough through whom report managers of international marketing and marketing communications.

The Hercules Film Group producers of oriented polypropylene films for a wide variety of packaging applications. Use areas include tobacco, snack foods, bakery products, candy, pharmaceuticals, personal care products and a number of industrial and overwrap applications.

Morton Thiokol Sees

Continued from Page 9

cated the company might make a large acquisition, but that its financial criteria are stringent. Morton-Thiokol would not accept the high prices and long-term dilution currently observable in the acquisition market, he said.

On the space shuttle program, he said the company has completed a preliminary redesign review with National Aeronautics and Space Administration and that redesign of the shuttle is proceeding faster than expected. The shuttle should be back in space early in 1988, Mr. Locke indicated. Morton-Thiokol's aerospace sales, which were \$320 million in fiscal 1986, will decline to \$280 million in fiscal 1987 because of the stand-down in the space shuttle program.

Mr. Locke noted that ample revenues and earnings will continue from Morton-Thiokol's broad involvement in aerospace, which has included every single strategic missile program the US has ever had.

Another new area of interest is Morton-Thiokol's involvement in the automotive air bag programs being developed by most of the automotive companies, including the American and Japanese auto makers. The air bag has been made standard equipment for Mercedes cars produced in the US, Mr. Locke noted.

In the specialty chemicals business, Morton-Thiokol's packaging adhesive resins were reported to be doing exceptionally well. Sales of Adhesives, Coatings & Sealants are expected to grow to \$265 million in the current fiscal year from \$210 million in fiscal 1986.

The water-based polymer business which Morton-Thiokol purchased from Monsanto Company about two years ago, is also performing very well, the analysts were told.

In the electronic chemicals business, Mr. Lockenot signs of an upturn in the depressed US market for computers, and disclosed that Morton-Thiokol and E.I. duPont de Nemours & Co. together have 90 percent of the photo resist market.

Avery Completes Purchase of Uniroyal

Avery Chemical, a subsidiary of Avery Inc., has completed the previously announced acquisition of Uniroyal Chemical Inc. (CMR, 5/10/88, page 9) for approximately \$700 million, the firm announced last week.

Uniroyal Chemical Inc., whose recorded sales totalled \$569 million last year, develops, makes and sells elastomers and specialty chemicals worldwide.

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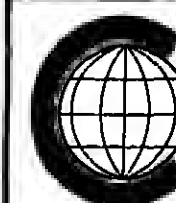
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PERFUMES & FLAVORINGS

Orange Oil Market Unaffected By New Florida Citrus Canker

The discovery of strain-A citrus canker in a trailer park South of Bradenton, Fla., last week caused a stir in the citrus industry. Fears that the damage done by a nursery infection in conjunction with a freeze two winters ago might be repeated were unfounded, however, as experts report only a minor infestation in Manatee County on the state's West Coast.

"The strain-A citrus canker was first detected last June on Anna-Marla island and in a grove in Palmetto," says a scientist with the Division of Plant Industry in Winterhaven, Fla., "so the infestation we picked up last week didn't surprise us." He emphasizes that Manatee County is not part of the major citrus growing areas because of steady residential development.

"The canker was probably there last Spring," concurs an industry observer. "But since they don't have the resources to go door to door, it's likely that other pockets of infestation will turn up in the near future."

Experts explain that the major vehicles for spreading the canker are lawn services which unknowingly work near infected trees. "The virus can be passed on by lawnmowers and equipment that have been used to tend contaminated areas; the clippings shorn on one property are used as mulch on another." Evidence for this has been in the location of the newly detected canker: ground level, or lawnmower height.

REGULATIONS ADEQUATE
Sources agree on the adequacy of state provisions for handling the potentially ruinous virus. "The regulatory program that's in place is sufficient to prevent any further contamination," says one scientist.

Once an infected area is discovered, the affected trees are uprooted and removed in covered trucks to an incineration site. Unaffected trees in close proximity to the tainted ones are severely pruned, or "huckhorned," all the way back to the trunk and then sprayed with a copper sulphate-based solution that kills any remaining virus.

"The size of the citrus industry engenders a scare reaction when someone mentions canker," says a citrus grower, "but this has been monitored closely since it's been discovered."

Another Florida citrus producer notes that market conditions are stagnant due to the pre-harvest timing. "The citrus market is not vibrant at this time of year; there's very limited availability of the Valencia or midseason orange oils."

According to an essential oils broker, the

freeze two years ago enabled Brazil to secure part of the Florida market. "Brazil has become an important supplier since then. They have established themselves and are being aggressive." The Florida producer agrees: "Midseason is 50 cents to 55 cents per pound f.o.b. Florida but Brazil undersells us at around 85 cents per kilo f.o.b. Brazil."

Other oils, an essential oils importer says, don't compete for the same volume market

PRICES TRENDLINES WEEK ENDING OCT. 31, 1986

CHANGES/UP	
Anise seed, Spanish, 2c. per lb.	
Anise seed, Turkish reconditioned, 8c. per lb.	
Sergamoi oil, Italian, 50c. per kilo	
Cumin seed, Turkish, 3c. per lb.	
Fennel seed, Indian, 8-9c. per lb.	
Ongar oil, Indian spot, 87c. per lb.	
Ongar root, Chinese, 2-4c. per lb.	
Lemon oil, Italian, 40-50c. per kilo	
Ocotea cymbarum oil, 15c. per kilo	
Sesame seed, Central American, 1c. per lb.	
Turnerite, Alleppey 3.00%, 5c. per lb.	
CHANGES/DOWN	
Asal leaves Egyptian fancy, 5c. per lb.	
Camphor oil, 1870, 5c. apr. lb.	
Cinnamon, Mexican, 3" cut, 35c. per lb.	
Oil seed, Indian reconditioned, 7c. per lb.	

PERFUMES INDEX

The Perfumes & Flavorings index reflects the prices of 11 representative materials in this sector and the quantity of each supplied in 1985.

Oct. 31, 1986	71.00
Oct. 24, 1986	71.00
Sept. 26, 1986	71.00
Nov. 1, 1985	71.00

Chemical Prices Start on Page 48

with the Brazilian and Floridian because they're more specialized products. "The Californian oil doesn't compete head to head with the others because producers there claim higher distillation and recovery costs." Israeli orange oil is also specialized and, though prices for it in the US have dropped 15 cents on a cost and freight New York basis to 72 cents per pound, it is available in such limited quantities that bulk purchasers look elsewhere for their oil.

ESSENTIAL OILS

OCOTEA CYMBARUM — Brazilian ocotea cymbarum firmed last week from \$5 per kilo f.o.b. Brazil to \$5.15 to \$5.20 per kilo
Continued on Page 65

ESSENTIAL OIL IMPORTS: AUGUST

SELECTIVE STATISTICS FROM THE CENSUS BUREAU.				
	AUG. '86	JULY '86	YR TO DATE	AUG. '86
Bergamot	10,193	9,182	72,932	9,013
Bitter Almond	---	---	3,413	18,432
Cassia	25,119	48,803	283,371	7,373
Cedarcane	8,000	3,507	15,320	480
Citronella	---	15,820	82,742	26,632
Clove	270,805	82,343	816,429	33,663
Coriander	123,135	21,083	901,934	79,382
Eucalyptus	5,424	36,313	182,732	37,665
Geranium	74,074	202,978	442,806	33,033
Levander	8,390	5,330	30,387	9,303
Lemon	10,647	9,330	33,443	22,870
Peppermint	98,403	37,349	1,332,040	158,007
Peppermint	24,000	20,275	33,756	18,000
Peppermint	132,683	131,738	804,644	150,953
Peppermint	97	43	224,111	6,314
Peppermint	30,778	7,695	6,132,118	559,462
Peppermint	242,726	290,433	2,043	26
Peppermint	132	37	623,618	33,674
Peppermint	100,727	66,267	78,248	1,180
Peppermint	14,821	25,833	199,093	33,382
Peppermint	27,833	12,083	21,776	9,970
Peppermint	1,518	1,527	68,660	3,788
Peppermint	7,268	1,827	35,331	15,898
Peppermint	4,410	2,753	87,079	9,515
Peppermint	1,344	7,598	36,777	9,081
Peppermint	2,332	22,037	61,380	5,724
Peppermint	22,124	3,864	---	---
Peppermint	7,024	---	---	---

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7,000	30	3,200	103
6,400	50	900	352

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1-8" DIA. 10" H. 304 SS VACUARY VACUUM
FILTER
1-4" x 3" KAL MICROTAN VACUARY VACUUM
FILTER ... COMPLETE WITH ALL ACCESSO-
RIES
1-7" DIA. TOWER SPRAY DRYER ...
COMPLETE WITH ALL ACCESSORIES

WANTED TO BUY YOUR
SURPLUS EQUIPMENT, PROCESS UNITS
AND COMPLETE PLANTS. WE HAVE
OUR OWN DISMANTLING CREWS

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AND COMPLETE PLANTS. WE HAVE
OUR OWN DISMANTLING CREWS

CENTRIFUGES
BASKET
46" x 30" Sharples 316 mdl. T1600 (2)
48" x 30" Tolhurst Hasi. C Automatic (3)
46" x 24" 316SS, Automatic, W/plow
PUSHER TYPE
DeLaval, 25", 2-Stage, 316SS
DISC/BOWL
DeLaval, Mdl. BRPK-309, SS, vert., & Mdl. BA-00, SS
Vibrophase 304 SS Mdl. SAMH-5036
Colaval, BRPK-213, 316 SS (2)
SOLID BOWLS
Sharples, Mdl. P1000, P3000, P5000, P5400, (2), SS
Sharples Mdl. P-3400 (3)
Bird, 40" x 60", 36" x 72", 32" x 50", 24" x 36", 10" x 42",
10" x 28" 12" x 30" SS
Podbielnik Mdl. 5000 comp. w/controls
VACUUM DRYERS
325 cu. ft. Abbe, 304 SS dbl. cone
200 cu. ft. 316SS, 6" x 11", rotary
164 cu. ft. Paterson "Conform", 316SS Dbl. cone
150 cu. ft. SS 304 SS Twin Shell
150 cu. ft. SS, & 150 cu. ft. Nickel clad
125 cu. ft. SS & CS, 4" x 14", 105/90/150 psi
125 & 83 cu. ft. Bullovak SS Rotary
90, 70, 60, 50, 30, cu. ft. PK SS & G/L dbl cone
70 cu. ft. KS Titanium dbl. cone
40, & 15 cu. ft. Stokes, SS rotary

GLASS * GLASS * GLASS
REACTORS
5,000 GAL. ODETRICH 100FV/50 REG ASSO
4,000 GAL. ODETRICH 100/90 PSI
3,000 GAL. ODETRICH, 100/90, PHILA. DIVE
3,000 GAL. RA SERIES, 100/90 TW, REG ASSO (2)
2,000 GAL. RA SERIES, 100/90 TW, REG ASSO
1,000 GAL. RA SERIES, 100/90 TW, REG ASSO
1,000 GAL. E SERIES, 25/80 (4)
750 GAL. 25/80 TW (2)
500 GAL. RA SERIES, 100/90, TW
400 GAL. E, SERIES, 25/80, TW
300 GAL. E, SERIES, 25/80, TW
200 GAL. E, SERIES, 25/80 REG ASSO, TW
100 GAL. E, SERIES, 25/80 TW
OVER 100 GLASS LINED REACTORS IN STOCK

GLASS LINED TANKS
FROM 5-22,000 GALLONS
TRAILER LOADS OF GLASS LINED PARTS AVAILABLE
LOU FALCONE - OUR G/L SPECIALIST WITH 21 YRS.
EXPERIENCE IS HERE TO HELP YOU!

STAINLESS STEEL REACTORS
20,000 GAL. 304SS, 40 & FV
8,000 GAL. 304 SS, 50/80 PSI
6,500 GAL. INCONEL 40/80 PSI AGIT.
6,000 GAL. 304SS, 100/150 PSI
4,200 GAL. 316 ELC, 50FV/60 PSI
3,000 GAL. 316 ELC, 75FV/150 PSI
2,800 GAL. 304 SS, 25FV/100 PSI
2,000 GAL. 316SS, 1,000/100 PSI
1,300 GAL. 316SS, 150FV/125 PSI
1,000 GAL. 316SS, 150FV/125 PSI
800 GAL. 316SS, 140FV/150 PSI (3)
750 GAL. 316 ELC, 180FV/140 PSI
500 GAL. INCONEL, 50 FV/60 PSI
400 GAL. HAST C, 210 FV/180 PSI

CALL NOW ABOUT GRANT RHODE ISLAND
A NEW JERSEY LIQUIDATION
MOST EQUIPMENT STILL INSTALLED
(09) Glass lined & SS Reactor system
complete with condenser, receiver
and control panels. from 50 gal. to
4000 gal.
(30) Filter Presses polypro & SS from
18" to 56" plate/ frame & recessed
plates.
(25) Vacuum dryer systems complete
with condensers, vacuum pumps and
receivers.
Double Conc: glass & SS.
Rotary Vacuum Dryers 316 SS
Vacuum Shelf Dryers SS and Hastelloy
lined.
(18) Centrifuges 316 SS automatic bar
hot centrifuges complete with control
and nitrogen purge
Scrubber systems/Vacuum filter sys-
tems/Glass lined and SS tank forms.
MUCH MORE !!!
30,000 Gal. 1974 Propane Tank 250
PSI
10,000 Gal. 347 SS Tanks (3)

WE RENT/LEASE
& SELL CHILLERS

PLEASE CALL CHARLES MASON FOR FURTHER INFORMATION AT 609-443-4545
UPE TO RECEIVE OUR FREE 300 PAGE ENCYCLOPEDIA OF CHEMICAL PROCESS EQUIPMENT
CALL OUR TOLL FREE NUMBER 800 CHEM-CAT (800-243-6228) IN N.J. - 609-443-4545 **UPE**

EQUIPMENT WANTED
GOOD, USED, CHEMICAL,
PHARMACEUTICAL & RELATED
EQUIPMENT - CENTRIFUGES,
DRYERS, FILTERS, REACTORS,
TANKS ETC.
WE WILL PURCHASE INDIVIDUAL
ITEMS OR COMPLETE
PLANTS.
CALL OUR OFFICE TODAY. TOP
DOLLARS PAID. NO DEAL TOO
BIG OR TOO SMALL.

DRYERS
Drum Dryers/Flakers
(1) 24" dia. x 36" Bullovak SS dbl. drum
dryer
(2) 24" dia. x 36" Blaw Knox CI dbl. drum
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CHEMICAL PROFILE

PROPYLENE

NOVEMBER 3, 1986

SUPPLY PRODUCER	CAPACITY*
Amoco, Chocolate Bayou, Tex. (E, c, p)	800
Amoco, Texas City, Tex. (R, c, p)	500
Amoco, Whiting, Ind. (R, p)	300
Arco, Channelview, Tex. (E, c, p)	1,700
Arco, Houston, Tex. (R, r)	270
Arco, Wilmington, Calif. (R, r)	80
Ashland, Catlettsburg, Ky. (R, r)	500
Chemplan, Corpus Christi, Tex. (R, r)	174
Chevron, Cedar Bayou, Tex. (E, p)	635
Chevron, El Segundo, Calif. (R, r)	110
Chevron, Philadelphia, Pa. (R, r)	180
Chevron, Port Arthur, Tex. (E and R, p)	450
Chevron, Richmond, Calif. (R, r)	190
Clerk, Blue Island, Ill. (R, r)	70
Clerk, Wood River, Ill. (R, r)	65
Coastal, Corpus Christi, Tex. (R, r)	55
Coastal, Westville, N.J. (R, r)	55
Corpus Christi Petrochemical, Corpus Christi, Tex. (E, p)	600
Cosden, Bay Spring, Tex. (R, c)	61
Cosden, Port Arthur, Tex. (R, c, r)	140
Dow, Freeport, Tex. (E, p)	400
Dow, Plaquemine, La. (E, p)	700
Du Pont, Chocolate Bayou, Tex. (E, c)	670
Du Pont, Orange, Tex. (E, c)	100
Easman, Longview, Tex. (E, c, p)	600
El Paso, Odessa, Tex. (E, p)	170
Enron, Clinton, Iowa (E, c)	60
Enron, Morris, Ill. (E, p)	200
Enterprise, Mont Belvieu, Tex. (R, p)	530
Exxon, Baton Rouge, La. (E and R, r, c)	1,200
Exxon, Baytown, Tex. (E and R, p, c)	1,200
Exxon, Bayway, N.J. (R, p)	400
Flint Oil & Chemical, Port Arthur, Tex. (R, c, r)	140
BP Goodrich, Calvert City, Ky. (E, c)	130
Hill Petroleum, Houston, Tex. (R, c)	240
Koch, Corpus Christi, Tex. (R, r)	200
Mobil, Beaumont, Tex. (E, p)	250
Phillips, Sweeny, Tex. (E and R, p)	580
Shell, Deer Park, Tex. (E and R, r, c)	1,700
Shell, Norco, La. (E and R, p, c)	1,400
Shell, Wood River, Ill. (R, r)	250
Southland, Lake Charles, La. (R, p)	240
Standard Oil Chemicals, Lima, Ohio, (R, c)	400
Sun, Marcus Hook, Pa. (R, p)	460
Sun, Tulsa, Okla. (R, r)	93
Texaco, Delaware City (R, r)	140
Texaco, El Dorado, Kan. (R, r)	55
Texaco, Port Arthur, (E, c)	500
Texaco City Refining, Texas City, Tex. (R, c)	120
Union Carbide, Seadrift, Tex. (E, c)	110
Union Carbide, Telf, La. (E, c)	420

Continued on Page 65

Vulcan's Chemical

Continued from Page 9

about 1.8 million to 1.9 million this year, Mr. Bailey said.

The Vulcan official noted that eventually the Senate and House bills will be combined in some kind of compromise, but meanwhile, Federal funding has become only a 20 percent portion of overall highway spending, versus 50 percent in earlier years.

The decline in housing starts will affect mostly multi-family dwellings which use far less construction materials per unit than do single-family houses, Mr. Bailey explained.

Williams J. Grayson, Jr., executive vice-president of corporate development, noted that the company has a 15 percent market share in recycling aluminum, an industry that has about 50 competitors operating at about 50 percent of capacity.

Vulcan does 80 percent of all detinning in the US and 100 percent of UK detinning, Mr. Grayson said. In the tin chemicals business, Vulcan was said to have a 40 percent market share.

Peter J. Clemens, 3rd, senior vice-president of finance, noted that a \$2 million improvement in chemical earnings in the latest quarter was entirely due to the lower production costs stemming from the new cogeneration project at Gelsmar.

Mr. Clemens observed that the company still has an authorization to purchase 391,000 of its shares out of a total authorization of 1 million which went into effect earlier this year.

On Friday, the day following the NYSSA meeting, Vulcan announced that this Wednesday, November 5, it will commence a "Dutch auction" cash self tender for between 250,000 and 1 million shares of its common stock. There are outstanding approximately 11 million shares of Vulcan common stock.

Pursuant to the tender offer, Vulcan will invite its shareholders to tender shares at prices not in excess of \$124 nor less than \$119 per share, specified by the tender holders.

Based upon the number of shares tendered and the prices specified by the shareholders, Vulcan will then determine the price per share that it will pay for the shares in cash. Vulcan will select a per-share price so as to enable it to purchase at least 250,000 shares if that number of shares are tendered.

Pollution Firm Acquired by IT

International Technology Corporation last week reported it acquired New England Pollution Control Company, Inc. Terms of the cash transaction were not disclosed.

Nepeco primarily is involved in environmental remediation operations with special expertise in the treatment and recovery of groundwater. The company, with 70 employees and offices in the states of Connecticut, New York, New Jersey and Florida has annual sales of \$10 million.

"Nepeco provides IT with geographic expansion in the northeastern United States and

Florida while complementing our existing remediation, emergency response and groundwater recovery and treatment activities," said Murray H. Hutcheon, IT's Chairman and Chief Executive Officer.

International Technology Corporation, based in Torrance, Cal., is the nation's leading firm dealing exclusively with the management of environmentally hazardous materials for government and industry. The company's common stock is traded on the New York Stock Exchange under the symbol ITX.

Biotechnology Venture Formed To Make Flavors

Igene Biotechnology, Inc. (NASDAQ: IGNE), has formed a joint venture with Biosoph Laboratories SARL, Le Puy, France to manufacture and market naturally fermented products for the flavors and fragrances industry worldwide. Biosoph Laboratories is a member of the Burmah Group of Companies and a subsidiary of Burmah France SA.

Molecules Naturelles SA, the new company to be created by the venture, will be headquartered in Paris, with manufacturing operations in Rouen, France. Manufacturing will be conducted by Molecules Naturelles with the assistance of Igene and Biosoph Laboratories. All necessary government approvals required under French law are expected shortly.

US operations will be conducted through wholly-owned subsidiary, Molecules Naturelles, Inc., based in Columbia, Md. No other terms of the agreement were announced.

"Molecules Naturelles will use Igene's proprietary microbial technology to produce natural substances designed to replace various petroleum-based chemicals now used in the manufacture of flavors and fragrances," says Robert Anslin, chairman of Igene Biotechnology, Inc.

Dr. Anslin estimates the worldwide market for natural flavor at approximately 125 million, with Europe and the US accounting for the bulk of these sales. "We expect to have initial products available for sale in Europe and the US early next year," he says.

According to J.G. Griffiths, managing director of Burmah Castrol Europe Limited, Swindon, England, "The joint venture represents an important new development for Burmah France following the formation of Biosoph Laboratories in France earlier this year."

John Paul Richter, president and general designate of Molecules Naturelles SA, said that the new company "intends to capitalize both Igene's demonstrated expertise in developing novel microorganisms and fermentation products and Biosoph's strengths and experience in esterification and the marketing of process aids."

JOB & PEOPLE



Lawrence F. Doyla, who has been appointed vice-president of human resources for the chemicals and plastics business group of Union Carbide Corporation. Mr. Doyla was formerly director of human resources for Carbide.

Celanese Names V-P, Gen'l Manager

Celanese Corporation has named C.E. Steel vice-president of resource administration at Celanese Specialties Group in Chatam, N.J. and E.F. Ebner general manager of Virginia Chemicals Inc., the position Mr. Steel vacated.

Mr. Steel will be responsible for directing human resources, quality management, innovations programs and communications for the specialties group.

Mr. Ebner will be responsible for protecting and maintaining the profitable growth of the core business of Virginia Chemicals Inc., a Celanese subsidiary located in Portsmouth, Va.



C.E. Steel

E.F. Ebner

OR. CAMPBELL HAWKINS has been appointed director of corporate technology at International Group, Inc. of Agincourt, Ontario, and Lyndhurst, N.J.

LAWRENCE MASCHERA has been named general manager of Belvidere operations at Hoffmann-La Roche Inc. NORMAN J. BROZENICK has been named regional sales manager of the Plastics & Rubber Division of Mobay Corporation for the Detroit area.

RANDI LEVINE has been appointed sales representative for the West Coast region in the Pigments Division of Degussa Corporation. YERON E. KARRIS has been named regional sales manager of Unilever Chemical,



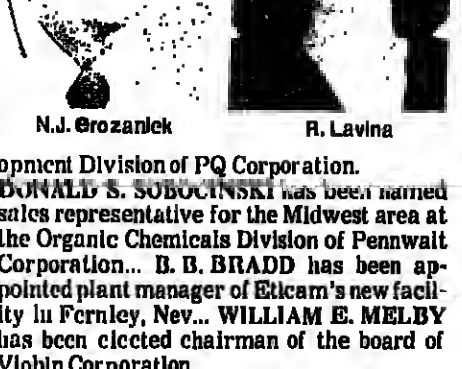
C. Hawkins

L. Mascare

a subsidiary of Unilever, Inc. JOSEPH M. DIBUSSOLO has been appointed project marketing manager in the Corporate Development Division of PQ Corporation.

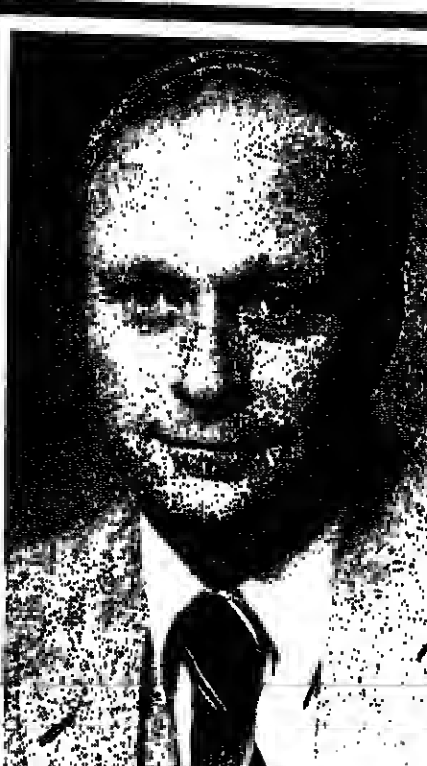
DONALD S. SOBOLINSKI has been named sales representative for the Midwest area at the Organic Chemicals Division of Penwalt Corporation. B.B. BRADDO has been appointed plant manager of Elcom's new facility in Fernley, Nev.

WILLIAM E. MELBY has been elected chairman of the board of Vobin Corporation. JOSEPH K. KAMIENSKI has been named manager of the accounting department at



N.J. Erozanic

R. Lavina

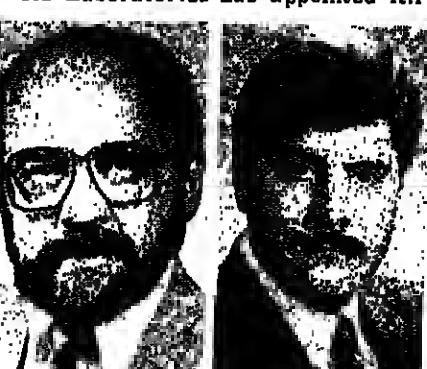


A.S. Cochran, who has been appointed marketing director of chloralkali products in the chemicals group of Olin Corporation. He was most recently chloralkali marketing manager.

National Starch & Chemical Corporation's Plainfield, N.J. office. WILLIAM T. LUTZ has been appointed vice-president of budgets, planning and control for SCM Pigments Corporation. JAMES J. HARTINGS has been elected president of Chemed Corporation's DuBois Institutional Division.

ALBERT F. JOHNS, MATTHEW M. SNYDER and FRANK ALVARADO have been appointed division managers for Princeton Pharmaceutical Products, a division of Squibb Corporation. SANDRA DICLEMENTE has been named regional sales director for the Western region and STEVE LEATHERMAN has been appointed mental health division manager.

Betz Laboratories has appointed R.P.



V. Koris

J.M. Dibussolo

Degen Co. Names V-P, Sales Manager

Degen Company has appointed Robert G. Russo senior vice-president and Joseph A. Mele regional sales manager for the North-Central and Northeast areas.

Mr. Russo will retain his responsibilities as vice-president of sales and marketing while assuming those of the senior executive of the company.

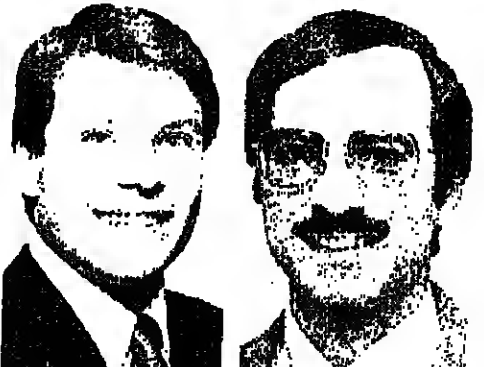
Mr. Mele joins Degen from a background in sales and marketing to the printing ink and specialty coating industry and will be working out of Degen's New Jersey office.



R.G. Russo

J.A. Mele

SEGADA district manager for the Pittsburgh area, J.G. SPAGNUOLO district manager for the Cleveland area and S.J. KRAYNAK district manager for the Gateway area.



D.S. Sobocinski

S. Bradd

ROBIN C. PAUL has been named deputy chairman and managing director of London-based Albright & Wilson Ltd., a wholly owned subsidiary of Tenneco Inc. EARL A. CLENDANIEL has been appointed vice-president and manager of marketing and sales for the Tar & Wood Products Division of Koppers Company, Inc. CHRISTOPHER E. GIBSON has been appointed director of market development in the Printing Products & Graphics Imaging Systems Division of Eastman Kodak Company.

MEETINGS CALENDAR

November 3, 1986

THIS WEEK

AMERICAN SOCIETY FOR TESTING AND MATERIALS, 7th Symposium on Paste Formulations and Application Systems, Phoenix Hilton, Phoenix, Ariz., November 5-8

CHEMICAL MARKETING RESEARCH ASSOCIATION, business school, personal computers in the workplace, Brancon Executive Conference Center, Princeton, N.J., November 5-7

COSMETIC, TOILETRY & FRAGRANCE ASSOCIATION, scientific conference and exhibit, J.W. Marriott Hotel, Washington, D.C., November 2-5

K-78, 10th International Trade Fair for Plastics and Rubber, Düsseldorf, West Germany, November 6-13

NATIONAL PAINT & COATINGS ASSOCIATION, 99th annual meeting, Atlanta Hilton Hotel, Atlanta, Ga., November 2-5

THIS MONTH

AMERICAN PETROLEUM INSTITUTE, annual meeting, San Francisco, Calif., November 6-11

CHEMICAL MANUFACTURERS ASSOCIATION, chemical industry conference, Palmer House Hotel, November 17-18, Chicago, Ill.

ORIG, CHEMICAL & ALLIED TRADES ASSOCIATION, Fall luncheon, Waldorf-Astoria Hotel, New York, November 19

ORY COLOR MANUFACTURERS ASSOCIATION, technical seminar, requirements under the Toxic Substances Control Act, Hilton Daleway Hotel, Gateway Center, Newark, N.J., November 12

EUROPEAN PETROCHEMICAL ASSOCIATION, inter-model transport seminar, Frankfurt Sheraton Hotel, Frankfurt, West Germany, November 20-21

FERTILIZER ROUND TABLE, Sheraton Inner Harbor Hotel, Baltimore, Md., November 17-18

FRAGRANCE MATERIALS ASSOCIATION OF THE UNITED STATES, 10th international congress of essential oils, fragrances and flavors, Omni Shoreham Hotel, Washington, D.C., November 16-20

ATIN AMERICAN PETROCHEMICAL ASSOCIATION, sixth annual meeting, Rio Palace Hotel, Rio de Janeiro, Brazil, November 20-25

SALES ASSOCIATION OF THE CHEMICAL INDUSTRY, annual luncheon meeting, Seithwood, Totowa, N.J., November 6

DECEMBER

CHEMICAL SPECIALTIES MANUFACTURERS ASSOCIATION, 72nd annual meeting, Marriott Harbor Beach Resort, Fort Lauderdale, Fla., December 7-11

NATIONAL ASSOCIATION OF CHEMICAL DISTRIBUTORS, 15th annual meeting, Ritz-Carlton-Naples Hotel, Naples, Fla., December 2-8

SALES ASSOCIATION OF THE CHEMICAL INDUSTRY, annual Christmas party, New York Hilton Hotel, New York, December 18; education committee, seminar, "The Psychology of Selling," Treedway Inn, Seddis Brook, N.J., December 18

LATER ON

AMERICAN INSTITUTE OF CHEMICAL ENGINEERS, conference on chemical process safety, international conference on chemical safety issues, Omni Shoreham Hotel, Washington, D.C., February 3-5

CHEMICAL MARKETING RESEARCH ASSOCIATION, Houston Meeting: "The US Chemical Industry: Responding to Change," The Westin Galleria Hotel, Houston, Tex., February 4-6, 1987

CHLORINE INSTITUTE, winter meeting, Mayflower Hotel, Washington, D.C., March 15-18

ORIG, CHEMICAL & ALLIED TRADES ASSOCIATION, 61st annual dinner, Waldorf-Astoria Hotel, New York, March 19

FERTILIZER INSTITUTE, 1987 annual meeting, Grand Orlando World Center, Orlando, Fla., February 1-3

INSTITUTE OF GAS TECHNOLOGY, 11th annual symposium on energy from biomass and wastes, Royal Plaza, West Disney World Village, Lake Buena Vista, Fla., February 2-5

SOAP AND DETERGENT ASSOCIATION, 80th annual meeting and industry convention, Boca Raton Hotel and Club, Boca Raton, Fla., January 29-February 1, 1987

SOCIETY OF THE PLASTICS INDUSTRY, 42nd annual conference of the reinforced plastics and composites institute, Cincinnati Convention Center, Cincinnati, Ohio, February 2-8

THE FERTILIZER INSTITUTE, 1987 annual meeting, 1st Orlando World Center, Orlando, Fla., February 1-3, 1987

BUSINESS BRIEFS

BASF CORPORATION has formed a new thermoplastic polyurethane elastomer business unit specializing in the market development and sales of TPU "Elastollan" for the injection molding, blow molding and extrusion industries. Formation of the business unit reflects the company's "continuing commitment to US markets," BASF says.

BALL CHEMICAL Company, Glenshaw, Pa., has appointed Fairway Corporation of Boston as its sales agent in the Southwest, which maintains a warehouse facility in Houston, produces pipe coatings, industrial finishes, electrical insulating varnishes and dyes and polyester resins.

CHEMICAL DYNAMICS Corporation has published its 1985-87 "Chernalog" handbook, featuring over 10,000 chemicals for research, development and manufacturing, including over 2,200 new products. The 760-page handbook provides CAS registry numbers, physical properties, structures and references for each item. The publication is available free from Chemical Dynamics at its South Plainfield, N.J., office.

HORIZON POLYMERS INC., Houston, Tex., has introduced two new polypropylene resin products, UHF 1180 and UHF 1500, with melt flows of 1100 and 1800 respectively. The ultra high flow products are commercially available with a variety of additive packages, including anti-static and UV incorporation, the company says.

NORANDA MINES, Toronto, Canada, says net income in the third quarter was \$4.7 million, as compared with a loss of \$30.6 million

in the same period of 1985, despite strikes at the company's electrolytic zinc, lumber and aluminum operations. Results in all four Noranda divisions were better than a year ago, a spokesman commented.

QUAKER CHEMICAL COMPANY, Coatesville, Pa., lifted its third-quarter sales to \$31,811,000 from \$30,414,000 a year earlier, and its net income increased to \$2,116,000 from \$1,589,000, reports Peter A. Benoliel, chairman of the specialty chemical company. Mr. Benoliel cited strength in international operations and favorable currency trends, and he expressed confidence in the company's expectations for the balance of the year.

REICHHOLD CHEMICALS INC. has published a new brochure describing how

"Polylite" polyester resin can be used to resurface concrete bridge decks quickly during off-peak traffic periods. The company has also introduced an all-purpose polyester resin for the manufacture of both onyx and marble and versatile enough to make small coatings, vanities and large tubs, according to Reichhold.

WITCO CORPORATION's Argus Division has established a statistical process control program for the manufacture of "Pearsall" aluminum chloride. The program centers on the use of process control charts at the division's Brainards, N.J., and La Porte, Tex., plants to monitor product consistency. "Pearsall" aluminum chloride is used as a catalyst to make ethyl benzene, tackifier resins and oil additives.

November 3, 1986